

# **ERP Chronicle Walkthrough Guide**

## **Module 1: Creating and Managing Patient Records**

### **A. Creating and Managing Patient Records**

- [Creating New Patient Record/ Viewing Other Patients](#)
- [Online Patient Self-Assessment](#)
- [Creating/Managing Patient Cohorts](#)
- [DSME Assessment & Health Status](#)
- [Contact History / Notes/ Documents](#)

### **B. Documenting Behavior Changes**

### **C. Documenting Clinical & Lab Values**

### **D. Documenting Medications**

### **E. Patient Snapshot Reports**

## **Module 2: Managing Classes & Documenting Education**

### **A. Setting up and Managing Classes**

- [Creating a 1:1 or Group Class](#)
- [Creating/Managing class templates for a series of classes](#)

### **B. Documenting Patient Education**

- [Topics Covered & Class Attendance](#)
- [Individual Pre Assessment and Post Education Evaluation](#)
- [DSME & Follow-Up](#)

## **Module 3: Creating/Editing letters with the Letter Manager**

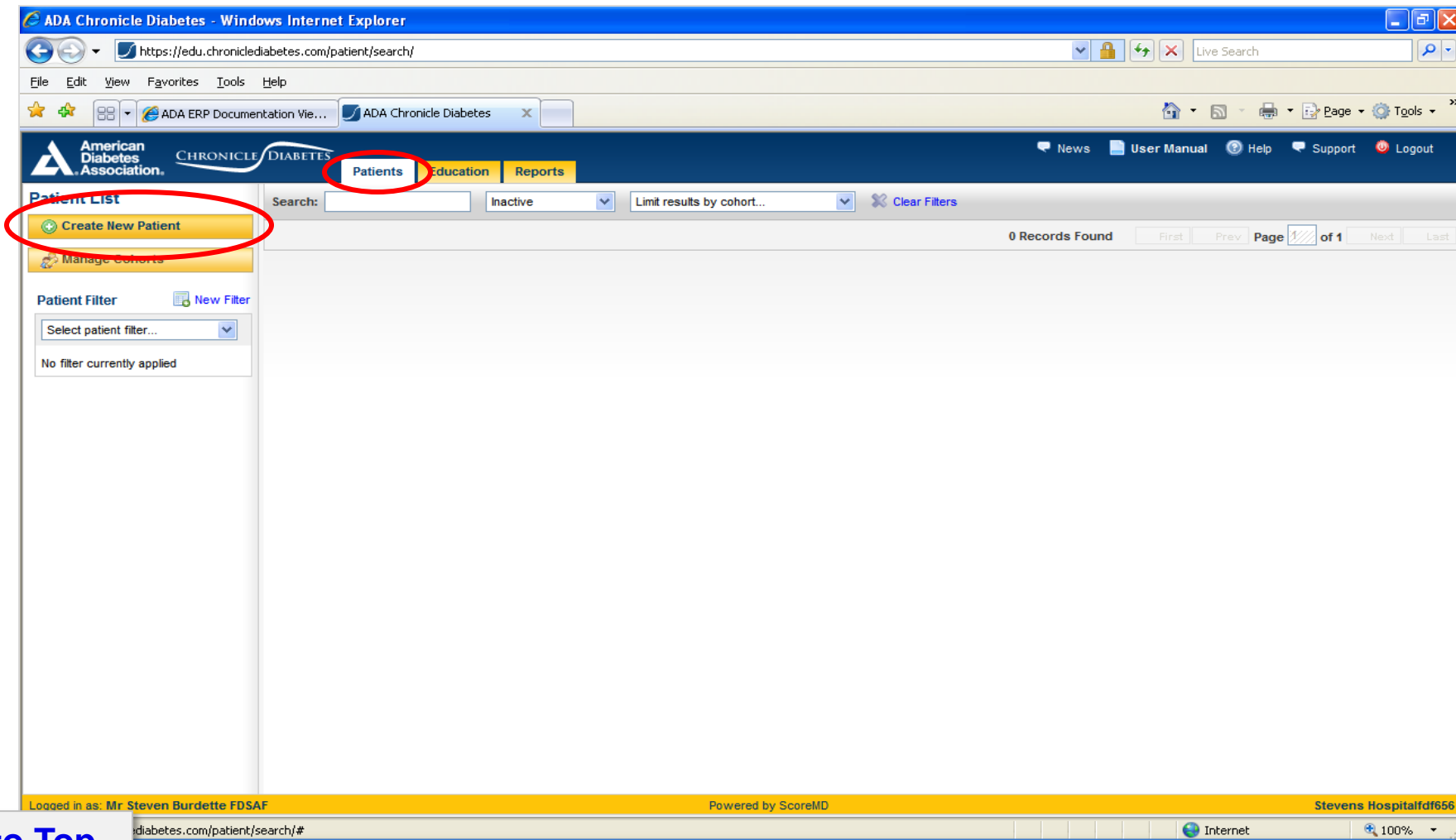
### **A. Creating and Editing Letters with the Letter Manager**

- [Creating and Editing Letters with the Letter Manager](#)
- [Generating Letters to send to Individual Patients and Class Participants](#)

## Module 1: Creating and Managing Patient Records

### Creating a new patient Record *Page 1 of 3*

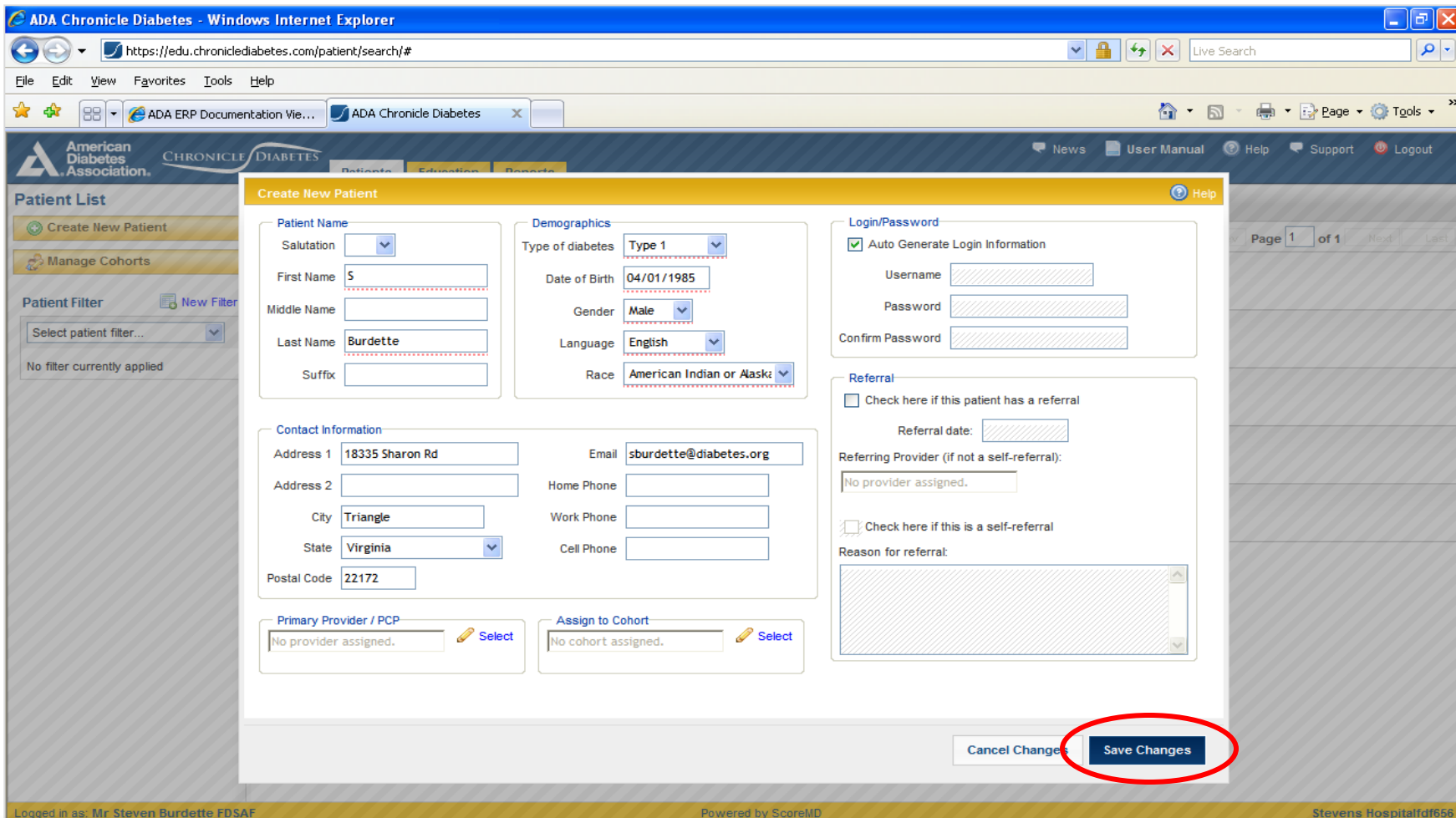
- 1) Click on the **Patients** tab at the top of the page, and then the **Create New Patient** button.



The screenshot shows a web browser window titled "ADA Chronicle Diabetes - Windows Internet Explorer" with the URL "https://edu.chronicdiabetes.com/patient/search/". The browser's address bar and search bar are visible. The application interface features a top navigation bar with the "American Diabetes Association" logo and the "CHRONICLE DIABETES" text. Below this, there are three tabs: "Patients", "Education", and "Reports". The "Patients" tab is selected and highlighted with a red circle. To the right of the tabs are links for "News", "User Manual", "Help", "Support", and "Logout". Below the navigation bar, the "Patient List" section is visible, with a "Create New Patient" button highlighted by a red circle. To the right of the button is a search bar with a dropdown menu set to "Inactive" and a "Clear Filters" link. Below the search bar, the text "0 Records Found" is displayed. On the left side of the page, there is a "Patient Filter" section with a dropdown menu labeled "Select patient filter..." and a message "No filter currently applied". The footer of the page shows the user is logged in as "Mr Steven Burdette FDSAF", the application is "Powered by ScoreMD", and the user ID is "Stevens Hospitaldf656".

## Creating a new patient Record *Page 2 of 3*

- 2) Fill in as much information as you have. Fields marked with a red dotted line under the field are required. Click **Save Changes**.



ADA Chronicle Diabetes - Windows Internet Explorer

https://edu.chronicdiabetes.com/patient/search/#

File Edit View Favorites Tools Help

ADA ERP Documentation Vie... ADA Chronicle Diabetes

News User Manual Help Support Logout

**Create New Patient**

**Patient Name**

Salutation

First Name

Middle Name

Last Name

Suffix

**Demographics**

Type of diabetes

Date of Birth

Gender

Language

Race

**Login/Password**

☒ Auto Generate Login Information

Username

Password

Confirm Password

**Contact Information**

Address 1

Address 2

City

State

Postal Code

Email

Home Phone

Work Phone

Cell Phone

**Primary Provider / PCP**

[Select](#)

**Assign to Cohort**

[Select](#)

**Referral**

☐ Check here if this patient has a referral

Referral date:

Referring Provider (if not a self-referral):

☐ Check here if this is a self-referral

Reason for referral:

Cancel Changes **Save Changes**

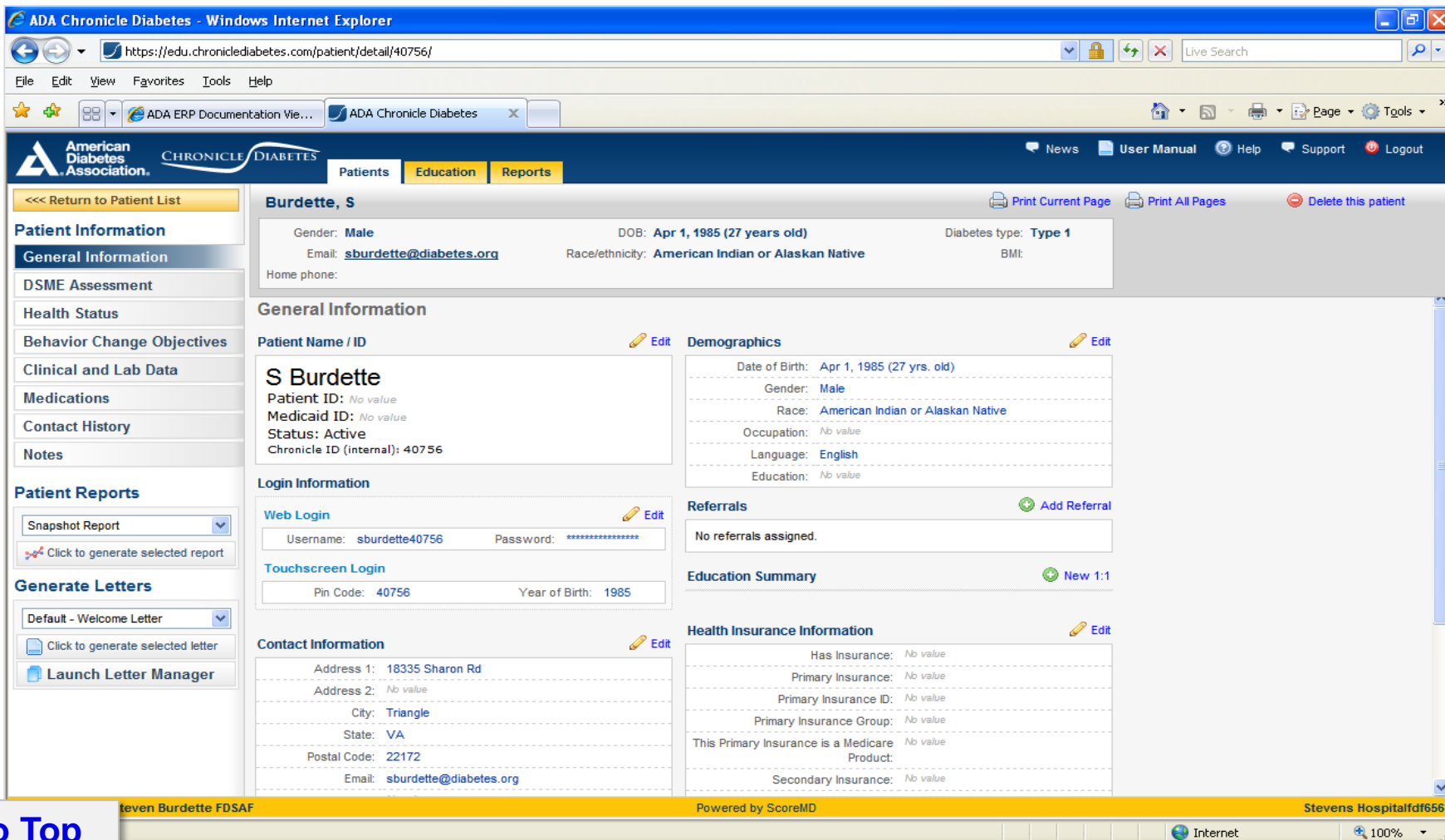
Logged in as: Mr Steven Burdette FDSA

Powered by ScoreMD

Stevens Hospitaldf656

## Creating a new patient Record *Page 3 of 3*

You will now be on the General Information page of the patient's record. You can view the various pages of the patient record by clicking the tabs on the left side of the page (e.g. DSME Assessment, Health Status, etc.)



The screenshot shows a web browser window titled "ADA Chronicle Diabetes - Windows Internet Explorer" with the URL <https://edu.chronicdiabetes.com/patient/detail/40756/>. The page displays the patient record for Steven Burdette, with tabs for Patients, Education, and Reports. The left sidebar contains navigation links for Patient Information, General Information, DSME Assessment, Health Status, Behavior Change Objectives, Clinical and Lab Data, Medications, Contact History, Notes, Patient Reports, and Generate Letters. The main content area shows the General Information tab selected, displaying patient details such as Gender (Male), DOB (Apr 1, 1985), Diabetes type (Type 1), Race/ethnicity (American Indian or Alaskan Native), and BMI. It also includes sections for Patient Name / ID, Demographics, Login Information, Referrals, Education Summary, Health Insurance Information, and Contact Information. The bottom of the page shows the patient's name (Steven Burdette FDSAF), the system (Powered by ScoreMD), and the hospital (Stevens Hospital/fdf556).

ADA Chronicle Diabetes - Windows Internet Explorer  
https://edu.chronicdiabetes.com/patient/detail/40756/

File Edit View Favorites Tools Help

ADA ERP Documentation Vie... ADA Chronicle Diabetes

News User Manual Help Support Logout

Patients Education Reports

<<< Return to Patient List

**Patient Information**

General Information

DSME Assessment

Health Status

Behavior Change Objectives

Clinical and Lab Data

Medications

Contact History

Notes

**Patient Reports**

Snapshot Report

Click to generate selected report

**Generate Letters**

Default - Welcome Letter

Click to generate selected letter

Launch Letter Manager

**Burdette, S**

Gender: Male DOB: Apr 1, 1985 (27 years old) Diabetes type: Type 1

Email: sburdette@diabetes.org Race/ethnicity: American Indian or Alaskan Native BMI:

Home phone:

**General Information**

Patient Name / ID Edit

S Burdette

Patient ID: No value

Medicaid ID: No value

Status: Active

Chronicle ID (internal): 40756

**Demographics** Edit

Date of Birth: Apr 1, 1985 (27 yrs. old)

Gender: Male

Race: American Indian or Alaskan Native

Occupation: No value

Language: English

Education: No value

**Login Information**

Web Login Edit

Username: sburdette40756 Password: \*\*\*\*\*

Touchscreen Login

Pin Code: 40756 Year of Birth: 1985

**Referrals** Add Referral

No referrals assigned.

**Education Summary** New 1:1

**Health Insurance Information** Edit

Has Insurance: No value

Primary Insurance: No value

Primary Insurance ID: No value

Primary Insurance Group: No value

This Primary Insurance is a Medicare Product: No value

Secondary Insurance: No value

**Contact Information** Edit

Address 1: 18335 Sharon Rd

Address 2: No value

City: Triangle

State: VA

Postal Code: 22172

Email: sburdette@diabetes.org

Print Current Page Print All Pages Delete this patient

Steven Burdette FDSAF

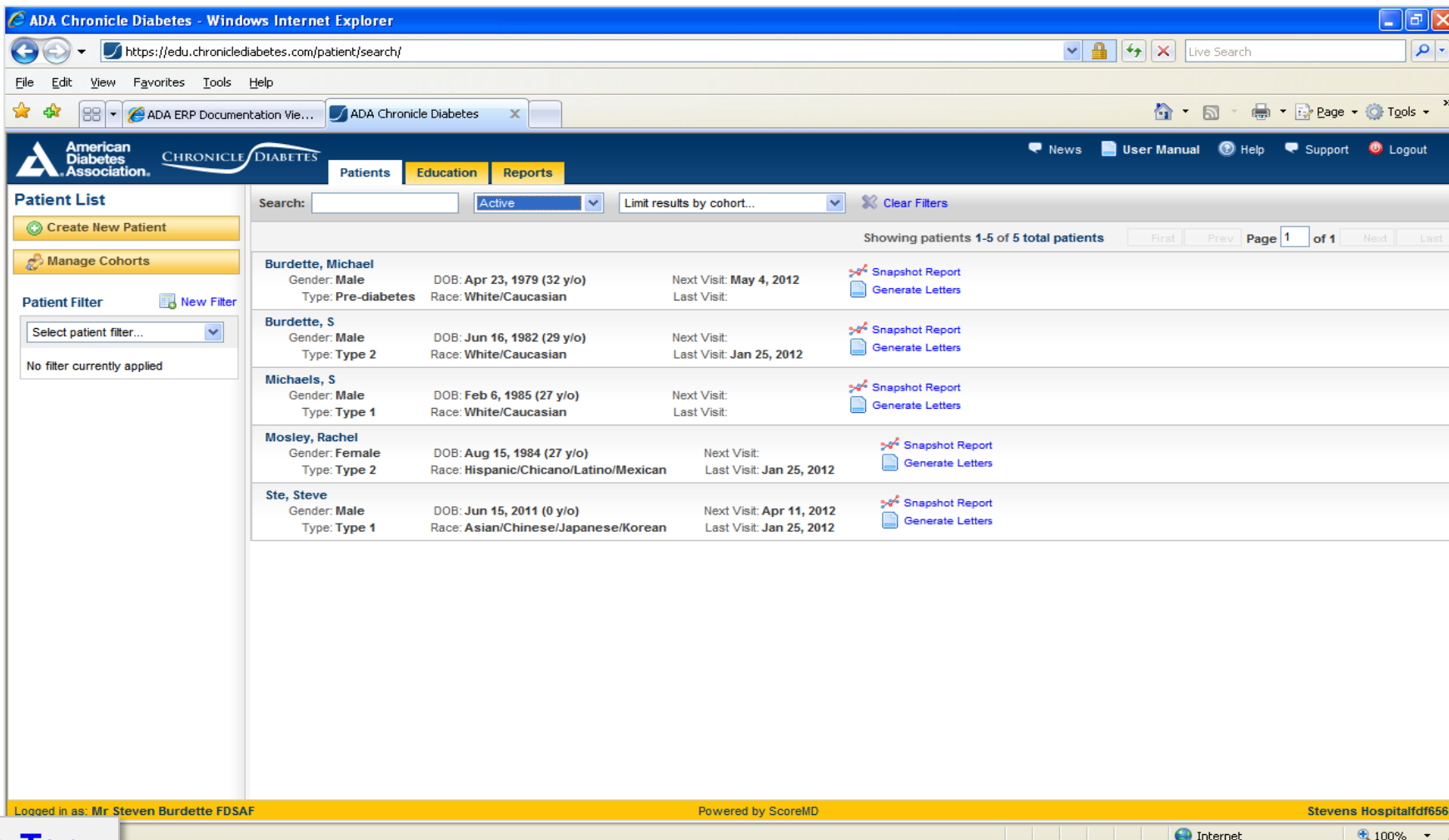
Powered by ScoreMD

Stevens Hospital/fdf556

Internet 100%

### Viewing other patients *Page 1 of 2*

1. Click the Return to Patient List button in the upper left. **Note** that the patient that you just added is listed in the patients table. If you do not see the patient you can search for them by typing their last name in the search box and hitting return.



The screenshot shows a web browser window titled "ADA Chronicle Diabetes - Windows Internet Explorer" with the URL "https://edu.chronicdiabetes.com/patient/search/". The browser's address bar and search bar are visible. The page content includes a navigation bar with "Patients", "Education", and "Reports" tabs. The "Patients" tab is active, displaying a "Patient List" section. On the left, there are buttons for "Create New Patient" and "Manage Cohorts", and a "Patient Filter" section with a dropdown menu and a "No filter currently applied" message. The main area shows a table of patients with columns for Name, Gender, DOB, Race, Next Visit, Last Visit, and actions (Snapshot Report, Generate Letters). The table lists five patients: Michael Burdette, S Burdette, S Michaels, Rachel Mosley, and Steve Ste. The page footer indicates the user is logged in as "Mr Steven Burdette FDSA" and the system is powered by ScoreMD.

ADA Chronicle Diabetes - Windows Internet Explorer

https://edu.chronicdiabetes.com/patient/search/

File Edit View Favorites Tools Help

ADA ERP Documentation Vie... ADA Chronicle Diabetes

News User Manual Help Support Logout

**Patient List**

Create New Patient

Manage Cohorts

Patient Filter New Filter

Select patient filter...

No filter currently applied

Search: Active Limit results by cohort... Clear Filters

Showing patients 1-5 of 5 total patients

Name	Gender	DOB	Race	Next Visit	Last Visit	Actions
Burdette, Michael	Male	DOB: Apr 23, 1979 (32 y/o)	White/Caucasian	Next Visit: May 4, 2012	Last Visit:	Snapshot Report Generate Letters
Burdette, S	Male	DOB: Jun 16, 1982 (29 y/o)	White/Caucasian	Next Visit:	Last Visit: Jan 25, 2012	Snapshot Report Generate Letters
Michaels, S	Male	DOB: Feb 6, 1985 (27 y/o)	White/Caucasian	Next Visit:	Last Visit:	Snapshot Report Generate Letters
Mosley, Rachel	Female	DOB: Aug 15, 1984 (27 y/o)	Hispanic/Chicano/Latino/Mexican	Next Visit:	Last Visit: Jan 25, 2012	Snapshot Report Generate Letters
Ste, Steve	Male	DOB: Jun 15, 2011 (0 y/o)	Asian/Chinese/Japanese/Korean	Next Visit: Apr 11, 2012	Last Visit: Jan 25, 2012	Snapshot Report Generate Letters

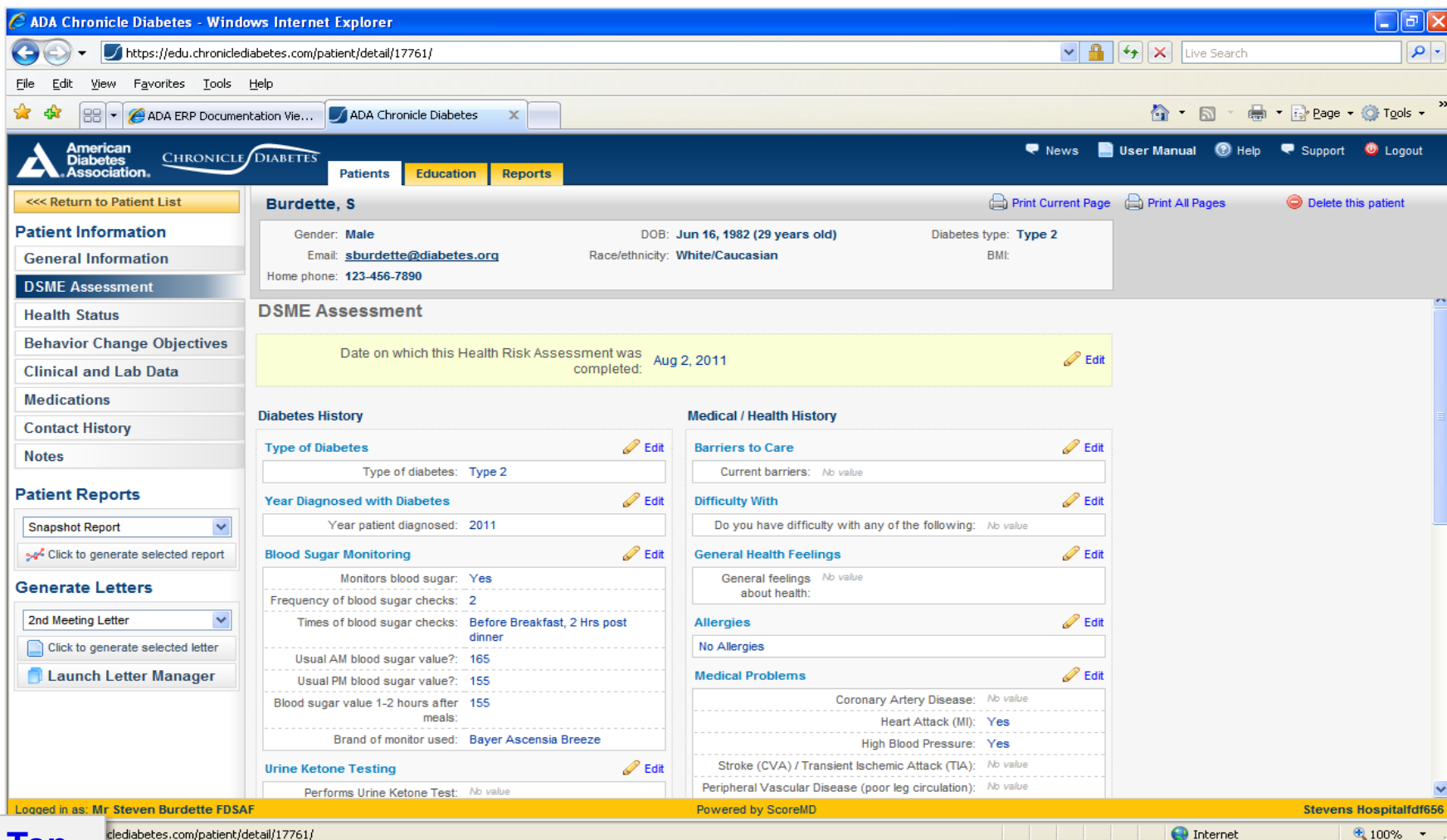
Logged in as: Mr Steven Burdette FDSA

Powered by ScoreMD

Stevens Hospitaldf656

## Viewing other patients *Page 2 of 2*

- Click on a patient's listing to open the patient's record. You will be on the General Information page of the patient's record. You can view the various pages of the patient record by clicking the tabs on the left side of the page (e.g. DSME Assessment, Health Status, etc.)



The screenshot shows a web browser window titled "ADA Chronicle Diabetes - Windows Internet Explorer" with the URL <https://edu.chronicdiabetes.com/patient/detail/17761/>. The page displays the patient record for Steven Burdette, a male born on June 16, 1982, with Type 2 Diabetes. The left sidebar contains navigation tabs for Patient Information, DSME Assessment, Health Status, Behavior Change Objectives, Clinical and Lab Data, Medications, Contact History, Notes, Patient Reports, and Generate Letters. The main content area shows the DSME Assessment for August 2, 2011, and a detailed Diabetes History section including blood sugar monitoring and ketone testing. A Medical / Health History section lists various conditions and allergies. The footer indicates the user is logged in as Mr. Steven Burdette FDSAF and the system is powered by ScoreMD.

**ADA Chronicle Diabetes - Windows Internet Explorer**

Address bar: <https://edu.chronicdiabetes.com/patient/detail/17761/>

File Edit View Favorites Tools Help

ADA ERP Documentation Vie... ADA Chronicle Diabetes

**American Diabetes Association. CHRONICLE DIABETES**

Patients Education Reports

[<<< Return to Patient List](#)

**Patient Information**

General Information

DSME Assessment

Health Status

Behavior Change Objectives

Clinical and Lab Data

Medications

Contact History

Notes

**Patient Reports**

Snapshot Report

Click to generate selected report

**Generate Letters**

2nd Meeting Letter

Click to generate selected letter

Launch Letter Manager

**Burdette, S**

Gender: Male DOB: Jun 16, 1982 (29 years old) Diabetes type: Type 2

Email: [sburdette@diabetes.org](mailto:sburdette@diabetes.org) Race/ethnicity: White/Caucasian BMI:

Home phone: 123-456-7890

[Print Current Page](#) [Print All Pages](#) [Delete this patient](#)

**DSME Assessment**

Date on which this Health Risk Assessment was completed: Aug 2, 2011 [Edit](#)

**Diabetes History**

**Type of Diabetes** [Edit](#)

Type of diabetes: Type 2

**Year Diagnosed with Diabetes** [Edit](#)

Year patient diagnosed: 2011

**Blood Sugar Monitoring** [Edit](#)

Monitors blood sugar: Yes

Frequency of blood sugar checks: 2

Times of blood sugar checks: Before Breakfast, 2 Hrs post dinner

Usual AM blood sugar value?: 165

Usual PM blood sugar value?: 155

Blood sugar value 1-2 hours after meals: 155

Brand of monitor used: Bayer Ascensia Breeze

**Urine Ketone Testing** [Edit](#)

Performs Urine Ketone Test: No value

**Medical / Health History**

**Barriers to Care** [Edit](#)

Current barriers: No value

**Difficulty With** [Edit](#)

Do you have difficulty with any of the following: No value

**General Health Feelings** [Edit](#)

General feelings about health: No value

**Allergies** [Edit](#)

No Allergies

**Medical Problems** [Edit](#)

Coronary Artery Disease: No value

Heart Attack (MI): Yes

High Blood Pressure: Yes

Stroke (CVA) / Transient Ischemic Attack (TIA): No value

Peripheral Vascular Disease (poor leg circulation): No value

Logged in as: Mr Steven Burdette FDSAF

Powered by ScoreMD

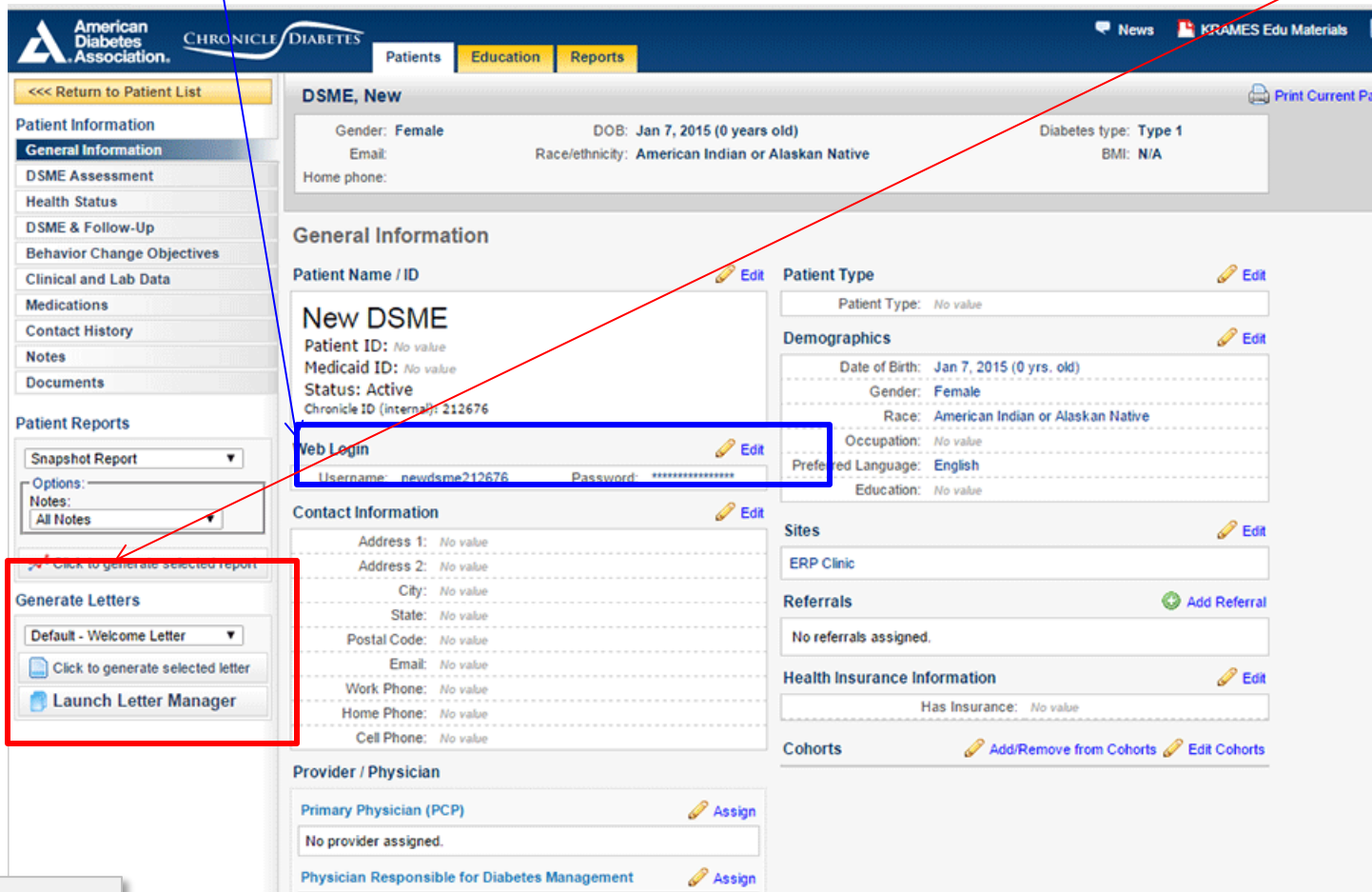
Stevens Hospitaldf656

[chronicdiabetes.com/patient/detail/17761/](https://edu.chronicdiabetes.com/patient/detail/17761/)

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## Online Patient Self-Assessment

When a patient record is created in Chronicle, the system automatically sets up a **username and password** for the patient to complete their assessment. The login credentials for the online patient self-assessment are included in the default **Welcome Letter** discussed in **Module 3**.



**American Diabetes Association** **CHRONICLE DIABETES** **Patients** **Education** **Reports** **News** **KRAMES Edu Materials** **Print Current Pa**

**<< Return to Patient List**

**DSME, New**

Gender: Female DOB: Jan 7, 2015 (0 years old) Diabetes type: Type 1  
Email: Race/ethnicity: American Indian or Alaskan Native BMI: N/A  
Home phone:

**General Information**

**Patient Name / ID** **Edit**  
**New DSME**  
Patient ID: No value  
Medicaid ID: No value  
Status: Active  
Chronicle ID (Internal): 212676

**Patient Type** **Edit**  
Patient Type: No value

**Demographics** **Edit**  
Date of Birth: Jan 7, 2015 (0 yrs. old)  
Gender: Female  
Race: American Indian or Alaskan Native  
Occupation: No value  
Preferred Language: English  
Education: No value

**Web Login** **Edit**  
Username: newdsme212676 Password: \*\*\*\*\*

**Contact Information** **Edit**  
Address 1: No value  
Address 2: No value  
City: No value  
State: No value  
Postal Code: No value  
Email: No value  
Work Phone: No value  
Home Phone: No value  
Cell Phone: No value

**Sites** **Edit**  
ERP Clinic

**Referrals** **Add Referral**  
No referrals assigned.

**Health Insurance Information** **Edit**  
Has Insurance: No value

**Cohorts** **Add/Remove from Cohorts** **Edit Cohorts**

**Provider / Physician**  
Primary Physician (PCP) **Assign**  
No provider assigned.  
Physician Responsible for Diabetes Management **Assign**

**Patient Reports**  
Snapshot Report  
Options:  
Notes:  
All Notes

**Generate Letters**  
Default - Welcome Letter  
Click to generate selected letter  
Launch Letter Manager

Click to generate selected report

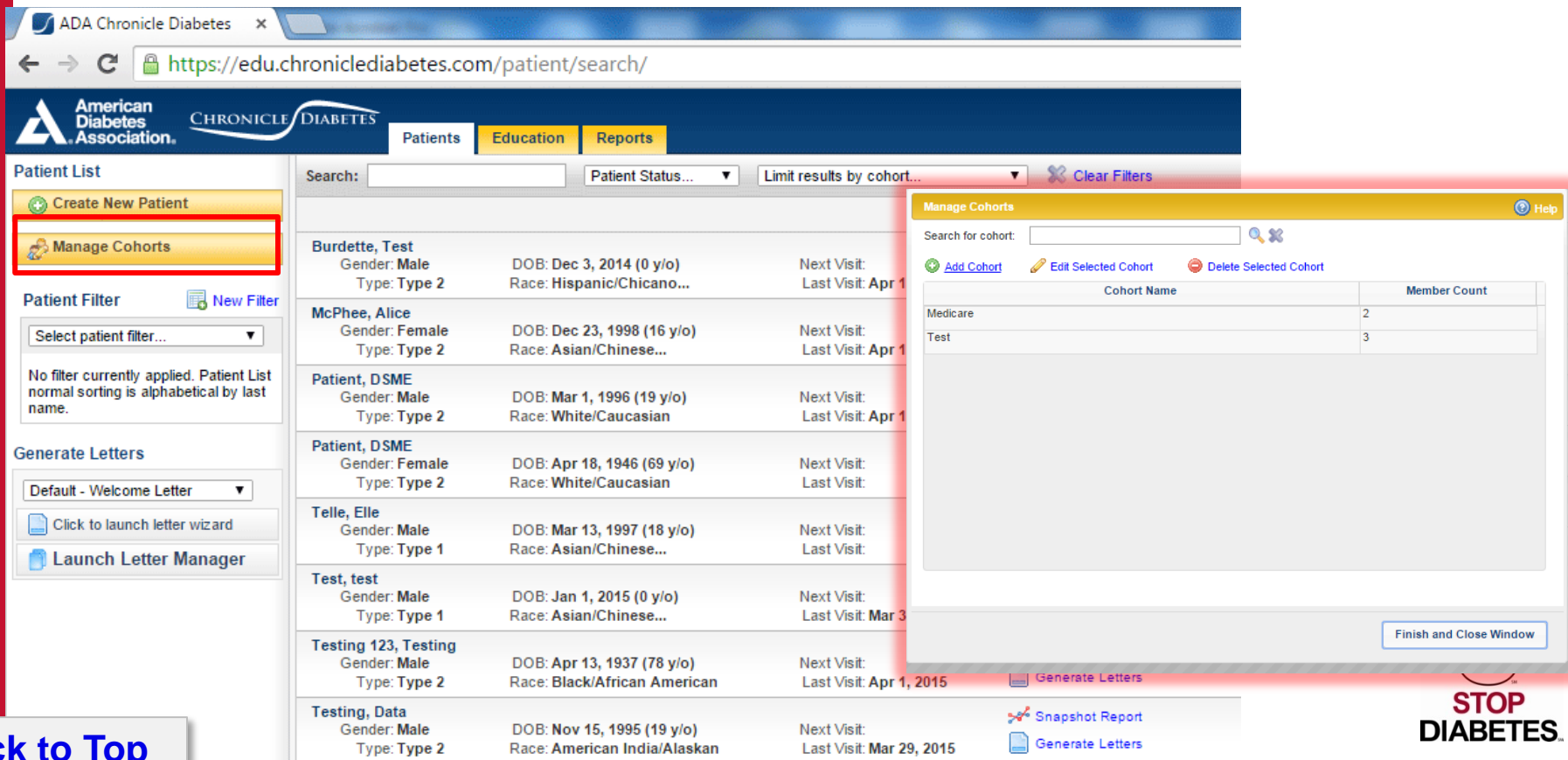


## Creating/Managing Patient Cohorts *Page 1 of 2*

Patient Cohorts are a way to categorize patients into groups of similar patient types such as Insulin Starts, GDMs, PEDs or Referring Provider.

### Creating/Managing a Cohort

1. From the Patients List Page, Click the **Manage Cohorts** Button
2. Click the *Add Cohort* button and give it an identifiable name
3. Select patients from the list to be in the cohort



The screenshot shows the ADA Chronicle Diabetes Patient List page. The 'Manage Cohorts' button is highlighted in the left sidebar. The main table lists patients with their details. A 'Manage Cohorts' modal window is open on the right, showing a search bar and a table with cohort names and member counts.

**Patient List**

Search:  Patient Status:  Limit results by cohort:  [Clear Filters](#)

Patient Name	Gender	DOB	Race	Next Visit	Last Visit
Burdette, Test	Male	Dec 3, 2014 (0 y/o)	Hispanic/Chicano...	Next Visit:	Last Visit: Apr 1
McPhee, Alice	Female	Dec 23, 1998 (16 y/o)	Asian/Chinese...	Next Visit:	Last Visit: Apr 1
Patient, DSME	Male	Mar 1, 1996 (19 y/o)	White/Caucasian	Next Visit:	Last Visit: Apr 1
Patient, DSME	Female	Apr 18, 1946 (69 y/o)	White/Caucasian	Next Visit:	Last Visit:
Telle, Elle	Male	Mar 13, 1997 (18 y/o)	Asian/Chinese...	Next Visit:	Last Visit:
Test, test	Male	Jan 1, 2015 (0 y/o)	Asian/Chinese...	Next Visit:	Last Visit: Mar 3
Testing 123, Testing	Male	Apr 13, 1937 (78 y/o)	Black/African American	Next Visit:	Last Visit: Apr 1, 2015
Testing, Data	Male	Nov 15, 1995 (19 y/o)	American India/Alaskan	Next Visit:	Last Visit: Mar 29, 2015

**Manage Cohorts**

Search for cohort:

[Add Cohort](#) [Edit Selected Cohort](#) [Delete Selected Cohort](#)

Cohort Name	Member Count
Medicare	2
Test	3

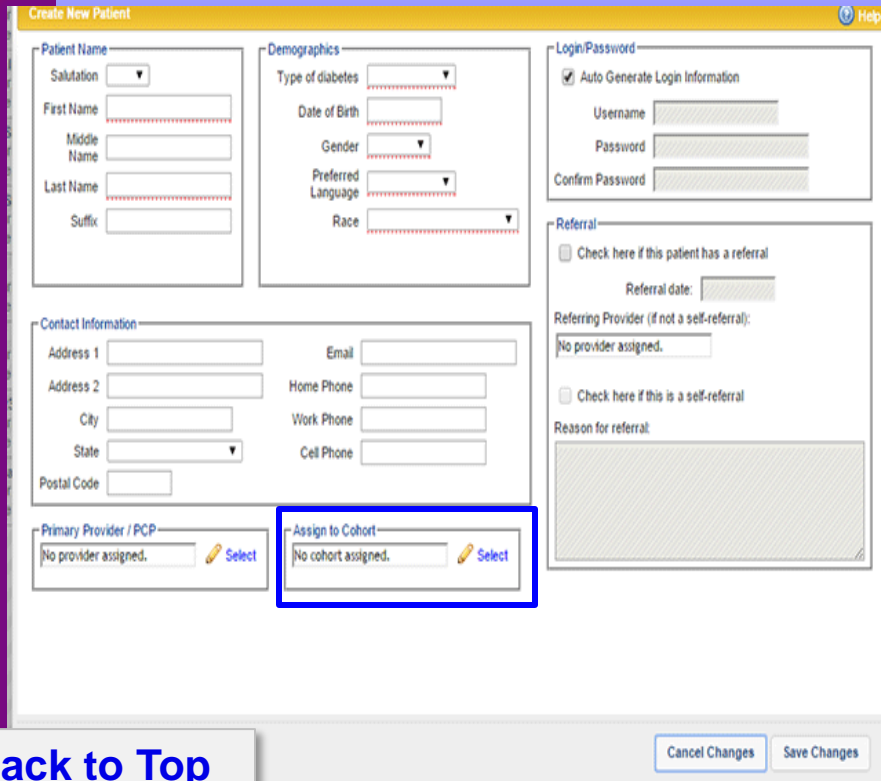
[Finish and Close Window](#)

[Generate Letters](#) [Snapshot Report](#) [Generate Letters](#)

## Creating/Managing Patient Cohorts *Page 2 of 2*

Assigning a Patient to a Cohort - Cohorts can be assigned when initially creating a patient record or added within the **general information** section of an existing patient.

Assigning a **patient cohort** while creating a new patient record.



**Create New Patient**

**Patient Name**  
 Salutation:   
 First Name:   
 Middle Name:   
 Last Name:   
 Suffix:

**Demographics**  
 Type of diabetes:   
 Date of Birth:   
 Gender:   
 Preferred Language:   
 Race:

**Login/Password**  
☒ Auto Generate Login Information  
 Username:   
 Password:   
 Confirm Password:

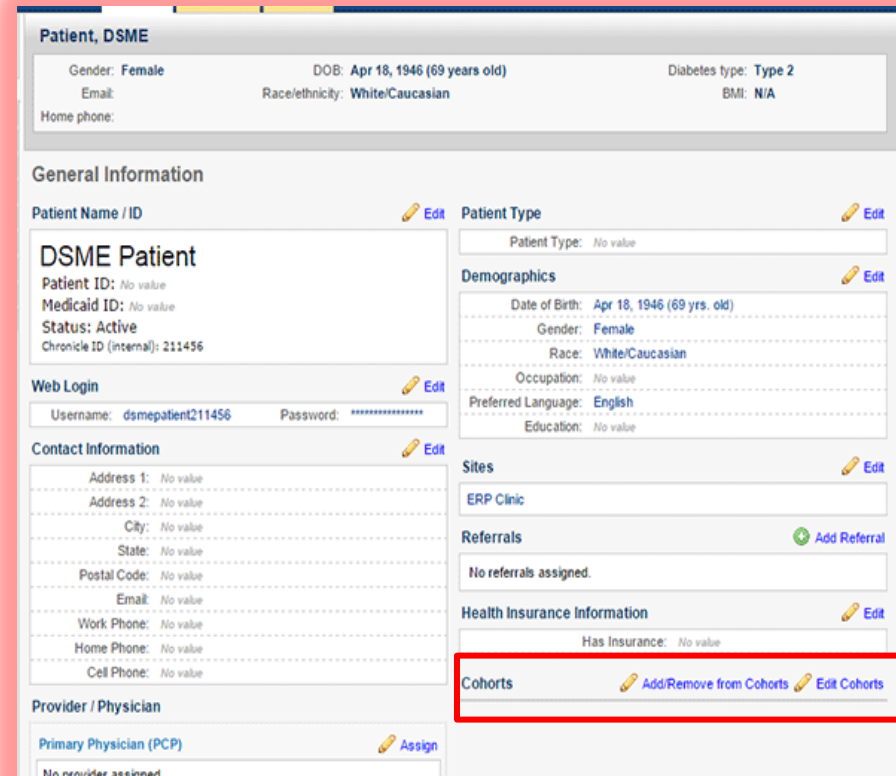
**Referral**  
☐ Check here if this patient has a referral  
 Referral date:   
 Referring Provider (if not a self-referral):  
 No provider assigned.  
☐ Check here if this is a self-referral  
 Reason for referral:

**Contact Information**  
 Address 1:   
 Address 2:   
 City:   
 State:   
 Postal Code:   
 Email:   
 Home Phone:   
 Work Phone:   
 Cell Phone:

**Primary Provider / PCP**  
 No provider assigned.

**Assign to Cohort**  
 No cohort assigned.

Assigning a **patient cohort** to an existing patient record.



**Patient, DSME**

Gender: Female DOB: Apr 18, 1946 (69 years old) Diabetes type: Type 2  
 Email: Race/ethnicity: White/Caucasian BMI: N/A  
 Home phone:

**General Information**

**Patient Name / ID**   
 DSME Patient  
 Patient ID: No value  
 Medicaid ID: No value  
 Status: Active  
 Chronicle ID (internal): 211456

**Web Login**   
 Username: dsmePatient211456 Password:

**Contact Information**   
 Address 1: No value  
 Address 2: No value  
 City: No value  
 State: No value  
 Postal Code: No value  
 Email: No value  
 Work Phone: No value  
 Home Phone: No value  
 Cell Phone: No value

**Demographics**   
 Patient Type: No value  
 Date of Birth: Apr 18, 1946 (69 yrs. old)  
 Gender: Female  
 Race: White/Caucasian  
 Occupation: No value  
 Preferred Language: English  
 Education: No value

**Sites**   
 ERP Clinic

**Referrals**   
 No referrals assigned.

**Health Insurance Information**   
 Has Insurance: No value

**Cohorts**

**Provider / Physician**   
 Primary Physician (PCP)  
 No provider assigned.

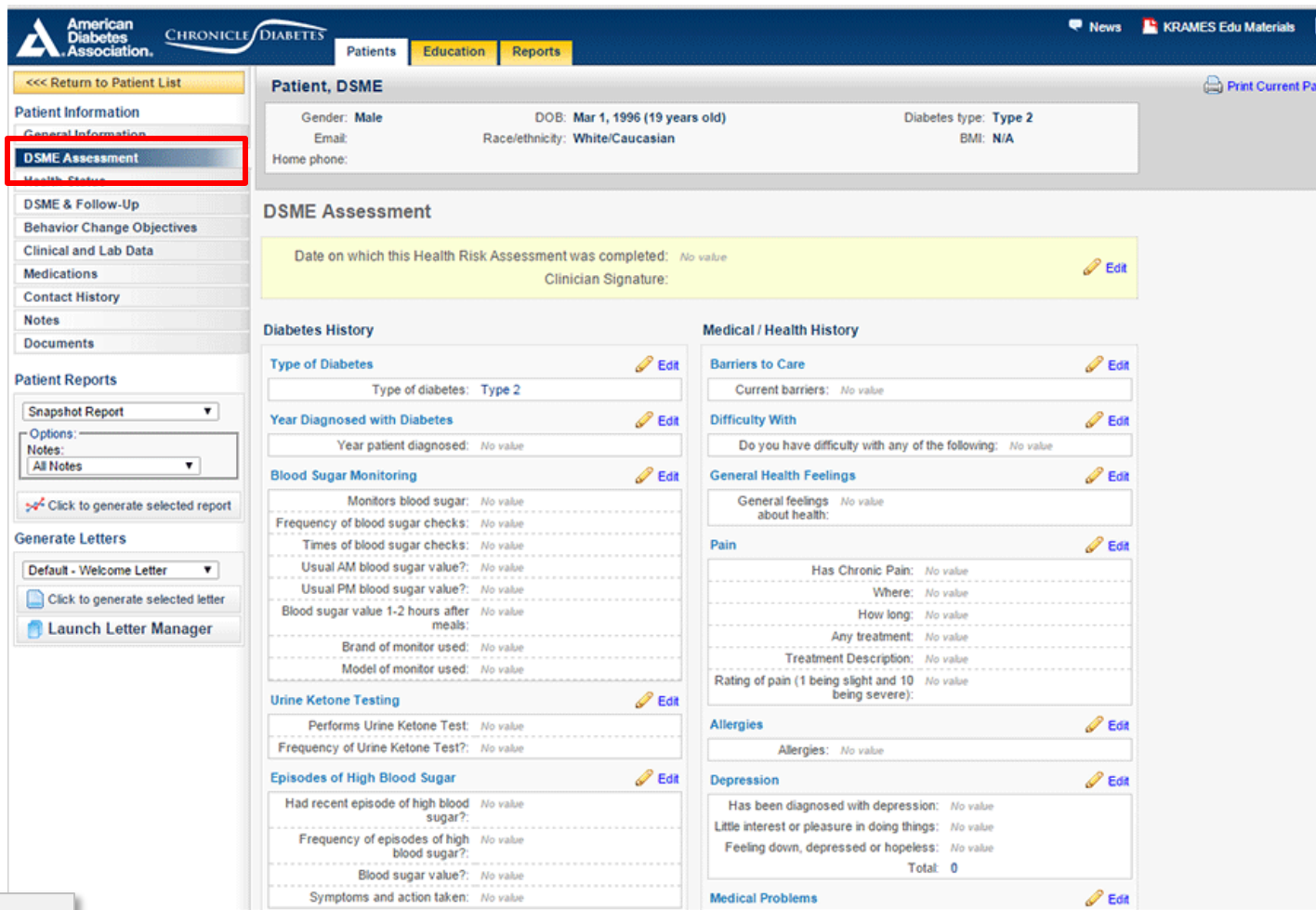
## Patient Cohort Tips

- Filter reports can be filtered by patient cohort
- Each Patient can be assigned to one or more cohorts
- You can Add, Edit or Delete a cohort through the Manage Cohorts button located near the upper left of the Patient List page.



## DSME Assessment & Health Status

The **DSME Assessment** can be completed electronically by the patient or by the educator on behalf of the patient. Any of the information on this page can be edited by clicking on the *Edit* pencil to the right of the section name.



The screenshot displays the DSME Assessment form within the American Diabetes Association's CHRONICLE DIABETES system. The interface includes a top navigation bar with 'Patients', 'Education', and 'Reports' tabs. A left sidebar contains a menu with 'DSME Assessment' highlighted. The main content area is titled 'Patient, DSME' and shows patient details: Gender: Male, DOB: Mar 1, 1996 (19 years old), Diabetes type: Type 2, Race/ethnicity: White/Caucasian, BMI: N/A, and Home phone. Below this, the 'DSME Assessment' section is divided into two columns. The left column contains 'Diabetes History' with fields for Type of Diabetes (Type 2), Year Diagnosed with Diabetes (No value), Blood Sugar Monitoring (Monitors blood sugar: No value, Frequency of blood sugar checks: No value, Times of blood sugar checks: No value, Usual AM blood sugar value?: No value, Usual PM blood sugar value?: No value, Blood sugar value 1-2 hours after meals: No value, Brand of monitor used: No value, Model of monitor used: No value), Urine Ketone Testing (Performs Urine Ketone Test: No value, Frequency of Urine Ketone Test?: No value), and Episodes of High Blood Sugar (Had recent episode of high blood sugar?: No value, Frequency of episodes of high blood sugar?: No value, Blood sugar value?: No value, Symptoms and action taken: No value). The right column contains 'Medical / Health History' with fields for Barriers to Care (Current barriers: No value), Difficulty With (Do you have difficulty with any of the following: No value), General Health Feelings (General feelings about health: No value), Pain (Has Chronic Pain: No value, Where: No value, How long: No value, Any treatment: No value, Treatment Description: No value, Rating of pain (1 being slight and 10 being severe): No value), Allergies (Allergies: No value), Depression (Has been diagnosed with depression: No value, Little interest or pleasure in doing things: No value, Feeling down, depressed or hopeless: No value, Total: 0), and Medical Problems. Each section has an 'Edit' pencil icon to its right.

**Patient, DSME**

Gender: Male      DOB: Mar 1, 1996 (19 years old)      Diabetes type: Type 2  
Email:      Race/ethnicity: White/Caucasian      BMI: N/A  
Home phone:

**DSME Assessment**

Date on which this Health Risk Assessment was completed: No value      Edit  
Clinician Signature:      Edit

**Diabetes History**

Type of Diabetes      Edit  
Type of diabetes: Type 2

Year Diagnosed with Diabetes      Edit  
Year patient diagnosed: No value

Blood Sugar Monitoring      Edit  
Monitors blood sugar: No value  
Frequency of blood sugar checks: No value  
Times of blood sugar checks: No value  
Usual AM blood sugar value?: No value  
Usual PM blood sugar value?: No value  
Blood sugar value 1-2 hours after meals: No value  
Brand of monitor used: No value  
Model of monitor used: No value

Urine Ketone Testing      Edit  
Performs Urine Ketone Test: No value  
Frequency of Urine Ketone Test?: No value

Episodes of High Blood Sugar      Edit  
Had recent episode of high blood sugar?: No value  
Frequency of episodes of high blood sugar?: No value  
Blood sugar value?: No value  
Symptoms and action taken: No value

**Medical / Health History**

Barriers to Care      Edit  
Current barriers: No value

Difficulty With      Edit  
Do you have difficulty with any of the following: No value

General Health Feelings      Edit  
General feelings about health: No value

Pain      Edit  
Has Chronic Pain: No value  
Where: No value  
How long: No value  
Any treatment: No value  
Treatment Description: No value  
Rating of pain (1 being slight and 10 being severe): No value

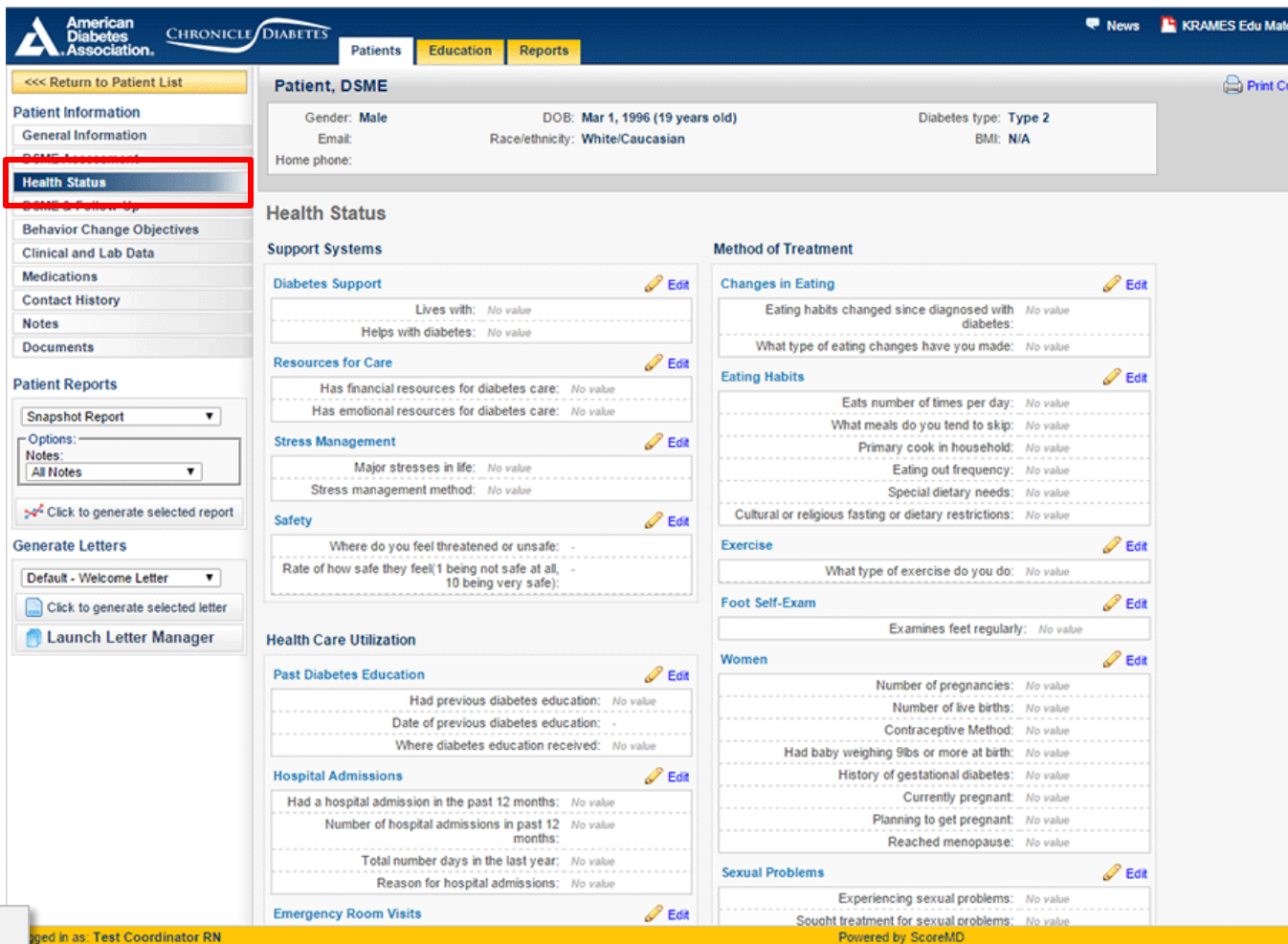
Allergies      Edit  
Allergies: No value

Depression      Edit  
Has been diagnosed with depression: No value  
Little interest or pleasure in doing things: No value  
Feeling down, depressed or hopeless: No value  
Total: 0

Medical Problems      Edit

## DSME Assessment & Health Status Page 1 of 2

The **Health Status section** can be completed electronically by the patient during their initial patient self-assessment (PSA) or by the educator on behalf of the patient. Any of the information on this page can be edited by clicking on the *Edit* pencil to the right of the section name.



**American Diabetes Association** **CHRONICLE DIABETES**

Patients Education Reports

<<< Return to Patient List

**Patient, DSME** [Print Cu](#)

Gender: Male DOB: Mar 1, 1996 (19 years old) Diabetes type: Type 2  
Email: Race/ethnicity: White/Caucasian BMI: N/A  
Home phone:

**Health Status**

**Support Systems**

**Diabetes Support** [Edit](#)

Lives with: No value  
Helps with diabetes: No value

**Resources for Care** [Edit](#)

Has financial resources for diabetes care: No value  
Has emotional resources for diabetes care: No value

**Stress Management** [Edit](#)

Major stresses in life: No value  
Stress management method: No value

**Safety** [Edit](#)

Where do you feel threatened or unsafe: -  
Rate of how safe they feel (1 being not safe at all, 10 being very safe): -

**Health Care Utilization**

**Past Diabetes Education** [Edit](#)

Had previous diabetes education: No value  
Date of previous diabetes education: -  
Where diabetes education received: No value

**Hospital Admissions** [Edit](#)

Had a hospital admission in the past 12 months: No value  
Number of hospital admissions in past 12 months: -  
Total number days in the last year: No value  
Reason for hospital admissions: No value

**Emergency Room Visits** [Edit](#)

**Method of Treatment**

**Changes in Eating** [Edit](#)

Eating habits changed since diagnosed with diabetes: No value  
What type of eating changes have you made: No value

**Eating Habits** [Edit](#)

Eats number of times per day: No value  
What meals do you tend to skip: No value  
Primary cook in household: No value  
Eating out frequency: No value  
Special dietary needs: No value  
Cultural or religious fasting or dietary restrictions: No value

**Exercise** [Edit](#)

What type of exercise do you do: No value

**Foot Self-Exam** [Edit](#)

Examines feet regularly: No value

**Women** [Edit](#)

Number of pregnancies: No value  
Number of live births: No value  
Contraceptive Method: No value  
Had baby weighing 9lbs or more at birth: No value  
History of gestational diabetes: No value  
Currently pregnant: No value  
Planning to get pregnant: No value  
Reached menopause: No value

**Sexual Problems** [Edit](#)

Experiencing sexual problems: No value  
Sought treatment for sexual problems: No value

Powered by ScoreMD

## Contact History / Notes / Patient Documents Page 1 of 3

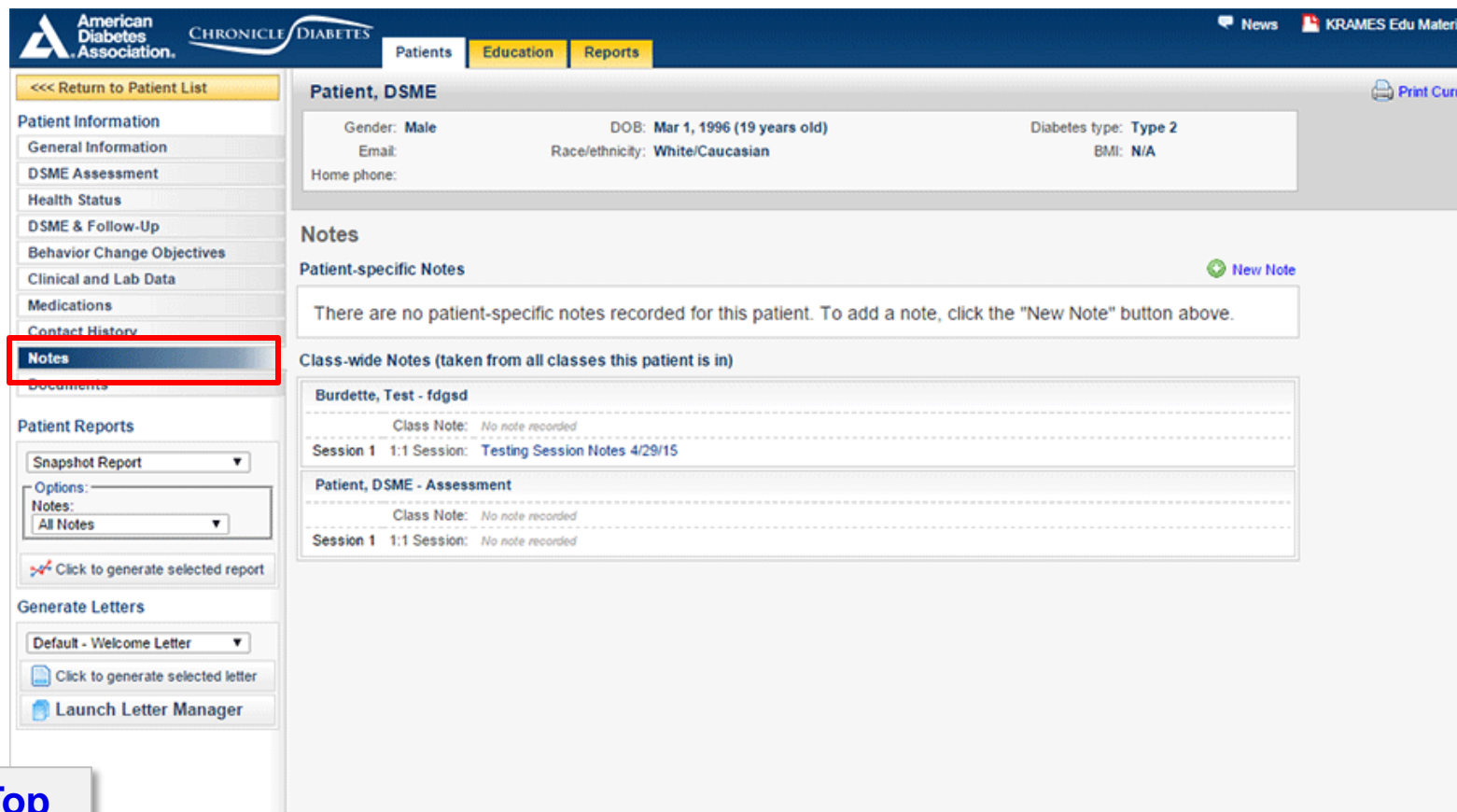
The **Contact History** section allows you to record and view contacts that have been made or attempted with the patient. Enter a date for the event, select the *Reason for Contact*, and the *Result of Contact*. If there is any other information that you'd like to record you can enter it in the *Notes* box.

The screenshot displays the American Diabetes Association CHRONICLE DIABETES patient management system. The left sidebar contains a navigation menu with the following items: Patient Information, General Information, DSME Assessment, Health Status, DSME & Follow-Up, Behavior Change Objectives, Clinical and Lab Data, Medications, **Contact History** (highlighted with a red box), Notes, and Documents. Below this are sections for Patient Reports (Snapshot Report, Options, Notes, All Notes) and Generate Letters (Default - Welcome Letter, Click to generate selected letter, Launch Letter Manager). The main content area shows patient information for 'Patient, DSME' (Gender: Male, DOB: Mar 1, 1996 (19 years old), Diabetes type: Type 2, Race/ethnicity: White/Caucasian, BMI: N/A). Below this is the 'Patient Contact History' section, which currently displays the message: 'There are no contact events recorded for this patient above.' A modal window titled 'Patient Contact History' is open, featuring a 'Help' button and the following fields: 'Contact Date' (text input), 'Reason for contact' (dropdown menu), 'Result of contact' (dropdown menu), and 'Notes regarding contact' (text area). At the bottom of the modal are 'Cancel Changes' and 'Save Changes' buttons.



## Contact History / **Notes** / Patient Documents Page 2 of 3

The **Notes** section allows you to record and view free-text notes about the patient. To add a new patient-specific note, click *Add New Note*, which will open the *Add / Edit Note* window. Below the patient-specific notes are both **class-wide notes** and **session-specific notes**. These are notes that are recorded for classes that the patient is in. Each class that the patient is in will be listed, and any class-wide and session notes will be displayed.



**American Diabetes Association. CHRONICLE DIABETES**

Patients Education Reports

<<< Return to Patient List

**Patient Information**

- General Information
- DSME Assessment
- Health Status
- DSME & Follow-Up
- Behavior Change Objectives
- Clinical and Lab Data
- Medications
- Contact History
- Notes**
- Documents

**Patient Reports**

Snapshot Report

Options:

Notes: All Notes

Click to generate selected report

**Generate Letters**

Default - Welcome Letter

Click to generate selected letter

Launch Letter Manager

**Patient, DSME**

Gender: Male DOB: Mar 1, 1996 (19 years old) Diabetes type: Type 2

Email: Race/ethnicity: White/Caucasian BMI: N/A

Home phone:

**Notes**

Patient-specific Notes [New Note](#)

There are no patient-specific notes recorded for this patient. To add a note, click the "New Note" button above.

Class-wide Notes (taken from all classes this patient is in)

Burdette, Test - fdgsd

Class Note: No note recorded

Session 1 1:1 Session: Testing Session Notes 4/29/15

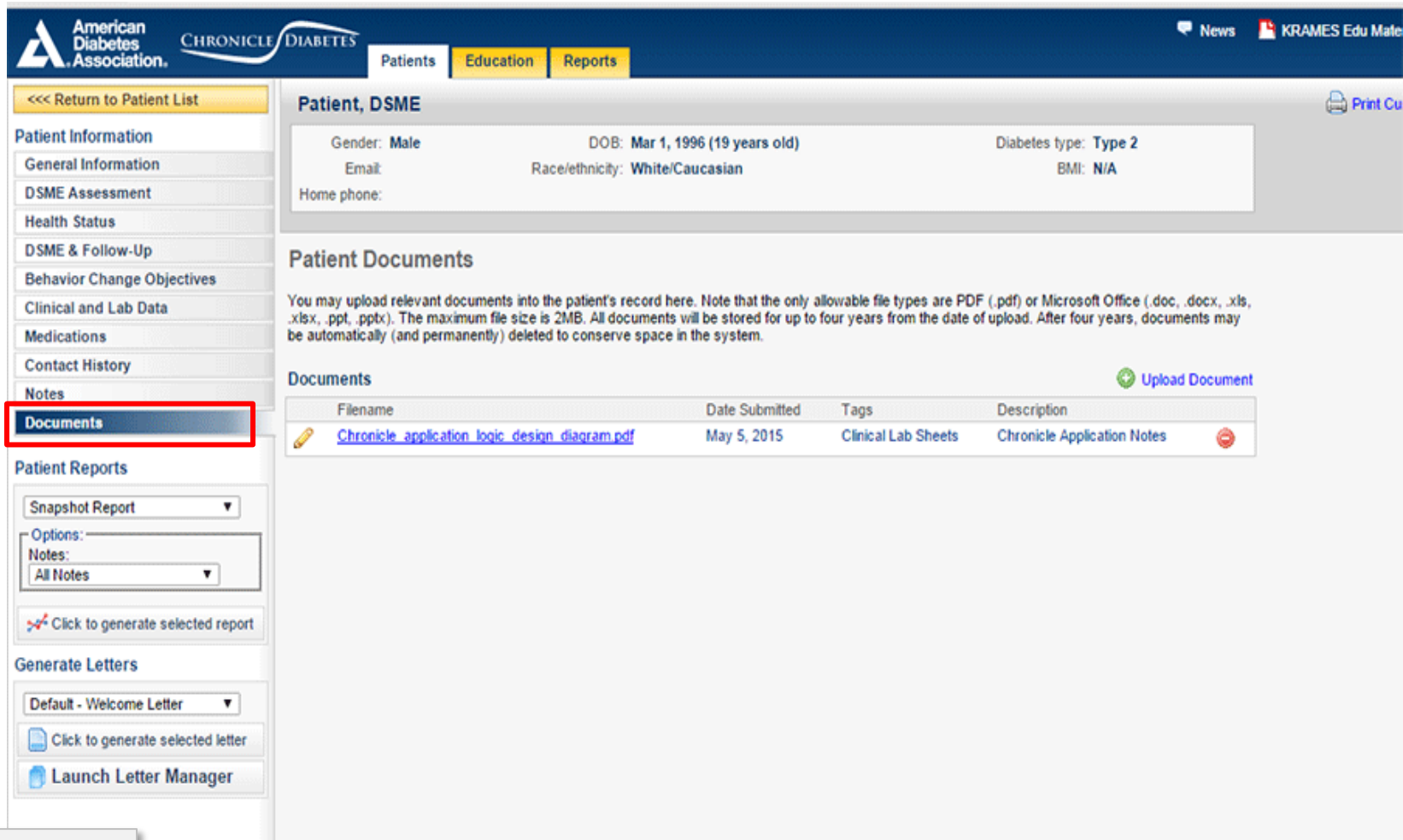
Patient, DSME - Assessment

Class Note: No note recorded

Session 1 1:1 Session: No note recorded

**Contact History / Notes / Patient Documents** *Page 3 of 3*

The **Patient Documents** section allows you to upload relevant documents into the patient's record. Note that the only allowable file types are PDF (.pdf) or Microsoft Office (.doc, .docx, .xls, .xlsx, .ppt, .pptx). The maximum file size is 2MB.



The screenshot displays the patient portal interface for the American Diabetes Association. The top navigation bar includes the logo, "CHRONICLE DIABETES", and tabs for "Patients", "Education", and "Reports". The left sidebar contains a list of patient information categories, with "Documents" highlighted in a red box. The main content area shows the "Patient, DSME" profile with personal details and a section for "Patient Documents". Below this, a table lists uploaded documents, including a PDF file named "Chronicle\_application\_logic\_design\_diagram.pdf".



**Patient, DSME**

Gender: Male      DOB: Mar 1, 1996 (19 years old)      Diabetes type: Type 2  
Email:      Race/ethnicity: White/Caucasian      BMI: N/A  
Home phone:

**Patient Documents**

You may upload relevant documents into the patient's record here. Note that the only allowable file types are PDF (.pdf) or Microsoft Office (.doc, .docx, .xls, .xlsx, .ppt, .pptx). The maximum file size is 2MB. All documents will be stored for up to four years from the date of upload. After four years, documents may be automatically (and permanently) deleted to conserve space in the system.

**Documents** [Upload Document](#)

Filename	Date Submitted	Tags	Description
 <a href="#">Chronicle_application_logic_design_diagram.pdf</a>	May 5, 2015	Clinical Lab Sheets	Chronicle Application Notes 

**Patient Reports**

Snapshot Report ▼

Options:

Notes: All Notes ▼

[Click to generate selected report](#)

**Generate Letters**

Default - Welcome Letter ▼

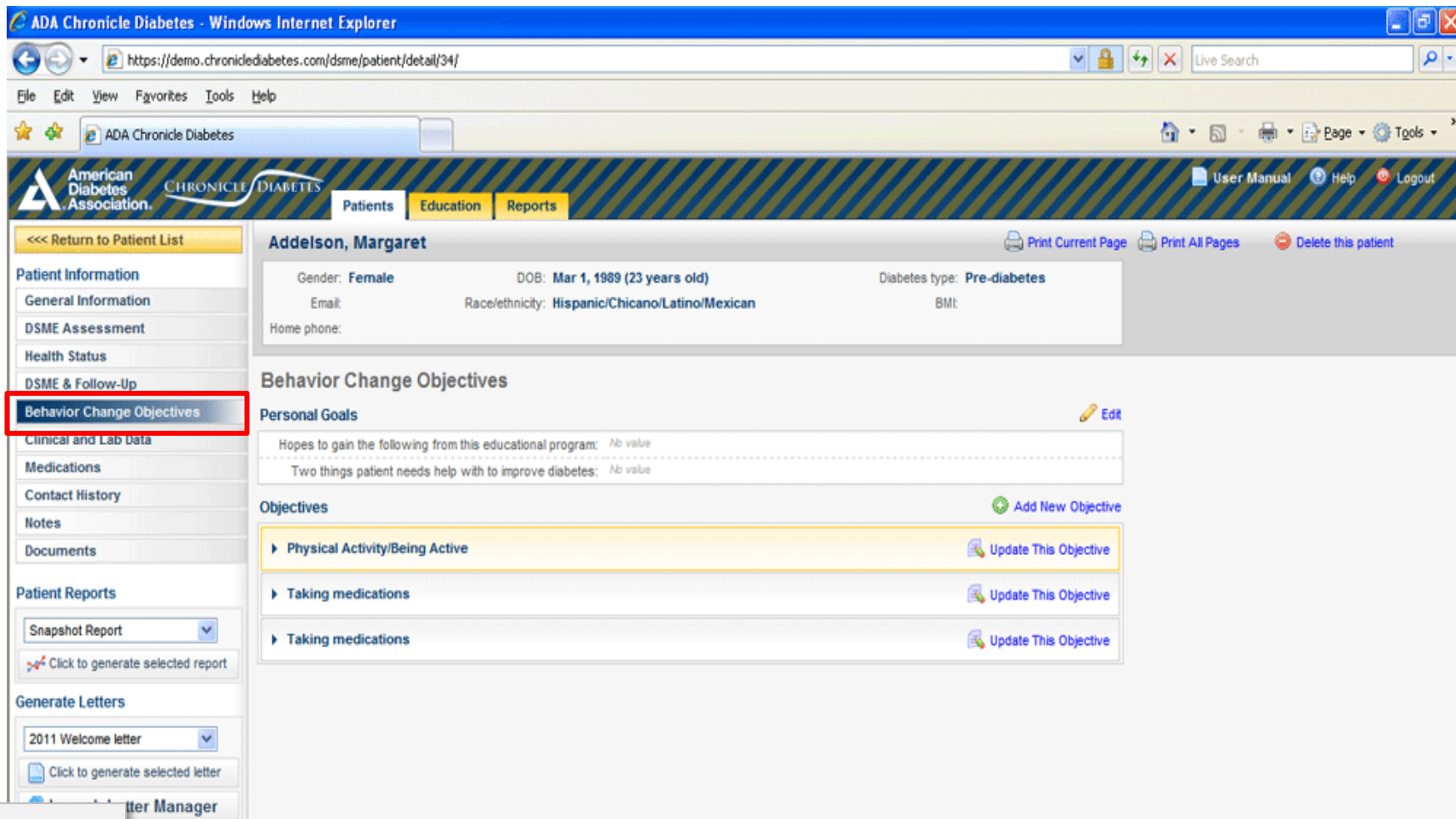
[Click to generate selected letter](#)

[Launch Letter Manager](#)



**Behavioral Change Objectives** *Page 1 of 2*

1. Clicking the **Behavior Change Objectives** tab from the left navigation pane displays a page that lists all of the patient's behavior change objectives, including a full history for each objective. At the top of the page are two *Personal Goals* which are questions asked of the patient during the PSA.



The screenshot shows a web browser window titled "ADA Chronicle Diabetes - Windows Internet Explorer" with the URL "https://demo.chronicdiabetes.com/dsme/patient/detail/34/". The page features the American Diabetes Association logo and navigation tabs for Patients, Education, and Reports. The left sidebar contains a navigation menu with options like Patient Information, Clinical and Lab Data, and Medications. The "Behavior Change Objectives" tab is highlighted in the sidebar. The main content area displays patient information for Margaret Addelson, including gender, date of birth, diabetes type, and race/ethnicity. Below this, the "Behavior Change Objectives" section shows "Personal Goals" and a list of "Objectives" such as "Physical Activity/Being Active" and "Taking medications", each with an "Update This Objective" link.

ADA Chronicle Diabetes - Windows Internet Explorer  
https://demo.chronicdiabetes.com/dsme/patient/detail/34/  
File Edit View Favorites Tools Help  
ADA Chronicle Diabetes  
American Diabetes Association CHRONICLE DIABETES  
Patients Education Reports  
User Manual Help Logout  
Addelson, Margaret  
Gender: Female DOB: Mar 1, 1989 (23 years old) Diabetes type: Pre-diabetes  
Email: Race/ethnicity: Hispanic/Chicano/Latino/Mexican BMI:  
Home phone:  
Behavior Change Objectives  
Personal Goals Edit  
Hopes to gain the following from this educational program: No value  
Two things patient needs help with to improve diabetes: No value  
Objectives Add New Objective  
Physical Activity/Being Active Update This Objective  
Taking medications Update This Objective  
Taking medications Update This Objective  
Patient Reports  
Snapshot Report  
Click to generate selected report  
Generate Letters  
2011 Welcome letter  
Click to generate selected letter  
Letter Manager

## Behavioral Change Objectives *Page 2 of 2*

2. The *Objectives* section allows you to document how the patient's objectives (and their adherence to those objectives) change over time. To add a new baseline objective, click on **Add new objective**. When you next follow up with the patient you can **update the objective's status**, recording the patient's new achievement level. An existing baseline objective or objective update can be edited by clicking on the **edit pencil** to the left of the record.

**Health Status**

DSME & Follow-Up

**Behavior Change Objectives**

Clinical and Lab Data

Medications

Contact History

Notes

Documents

**Patient Reports**

Snapshot Report ▼

Click to generate selected report

**Generate Letters**

2011 Welcome letter ▼

Click to generate selected letter

Launch Letter Manager

### Behavior Change Objectives

**Personal Goals** Edit

Hopes to gain the following from this educational program: *No value*

Two things patient needs help with to improve diabetes: *No value*

**Objectives**

Add New Objective

Update This Objective

Established/Updated	Objective	Achievement	Status	Barriers Addressed
<div> <span>Jul 22, 2010</span> </div>	<b>Be more physically fit</b> Plan: take the stairs at work Outcome: less out of breath Followup Method: Notes:	100% (All of the time)	Discontinued	No
<div> <span>Apr 27, 2009</span> </div>	Be more physically fit	75% (Most of the time)	Continued	Yes
<div> <span>Mar 24, 2009</span> </div>	Be more physically fit	0% (None of the time)	Baseline	Yes

Delete this Objective

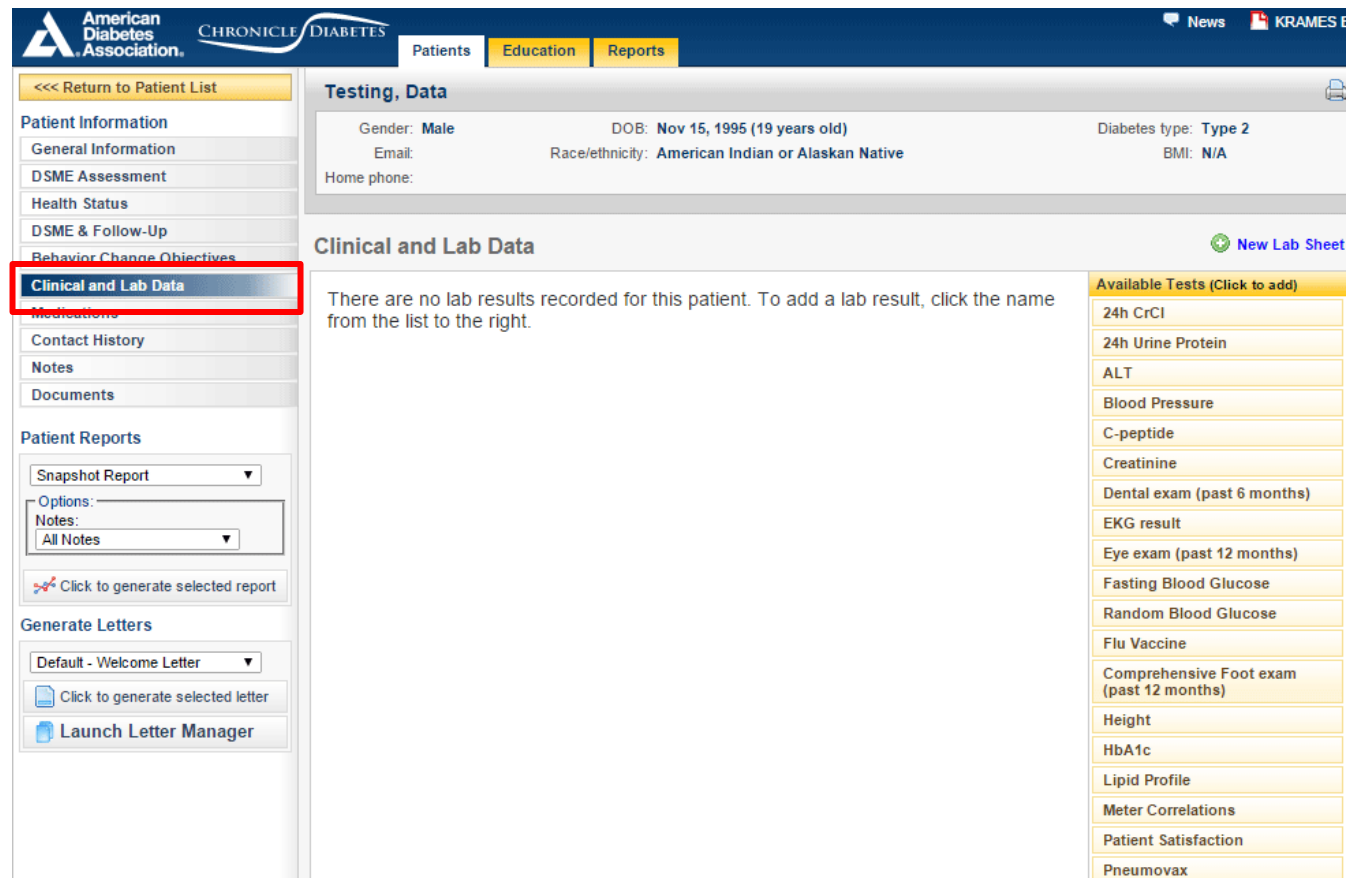
▶ Taking medications Update This Objective

▶ Taking medications Update This Objective

## Clinical Data and Labs *Page 1 of 4*

Clicking the **Clinical and Lab Data** button from the left navigation pane displays a page that lists all of the most recent clinical data and lab information for the patient. For a new patient with no clinical data or labs documented, the main middle section of this page will be empty and the full list of *Available Tests* will be displayed on the right side of the page.

As test values are documented, those values will be displayed in the main middle section and the test will be removed from the *Available Tests* lists.



**American Diabetes Association CHRONICLE/DIABETES**

Patients Education Reports

<<< Return to Patient List

**Patient Information**

- General Information
- DSME Assessment
- Health Status
- DSME & Follow-Up
- Behavior Change Objectives
- Clinical and Lab Data**
- Medications
- Contact History
- Notes
- Documents

**Patient Reports**

Snapshot Report ▼

Options:

Notes: All Notes ▼

Click to generate selected report

**Generate Letters**

Default - Welcome Letter ▼

Click to generate selected letter

Launch Letter Manager

**Testing, Data**

Gender: Male DOB: Nov 15, 1995 (19 years old) Diabetes type: Type 2

Email: Race/ethnicity: American Indian or Alaskan Native BMI: N/A

Home phone:

**Clinical and Lab Data** [New Lab Sheet](#)

There are no lab results recorded for this patient. To add a lab result, click the name from the list to the right.

**Available Tests (Click to add)**

- 24h CrCl
- 24h Urine Protein
- ALT
- Blood Pressure
- C-peptide
- Creatinine
- Dental exam (past 6 months)
- EKG result
- Eye exam (past 12 months)
- Fasting Blood Glucose
- Random Blood Glucose
- Flu Vaccine
- Comprehensive Foot exam (past 12 months)
- Height
- HbA1c
- Lipid Profile
- Meter Correlations
- Patient Satisfaction
- Pneumovax

## **Clinical Data and Labs - Adding a new clinical data or lab test result** *Page 2 of 4*

After you have gathered clinical data or lab results for a patient, you can enter both the most recent values as well as historical values into Chronicle. To enter a test result for a test that doesn't have any previous data, begin by clicking on the test's name in the *Available Tests* lists. Alternatively, if the test already has one or more previous results and you're going to be adding another test result, click the *Add Results* link to the right of the test's name. Doing either of these will bring up the *New Lab* window.

### **Enter the following information:**

- Test result
- Date Performed
- Source of data
- Notes
- Provider

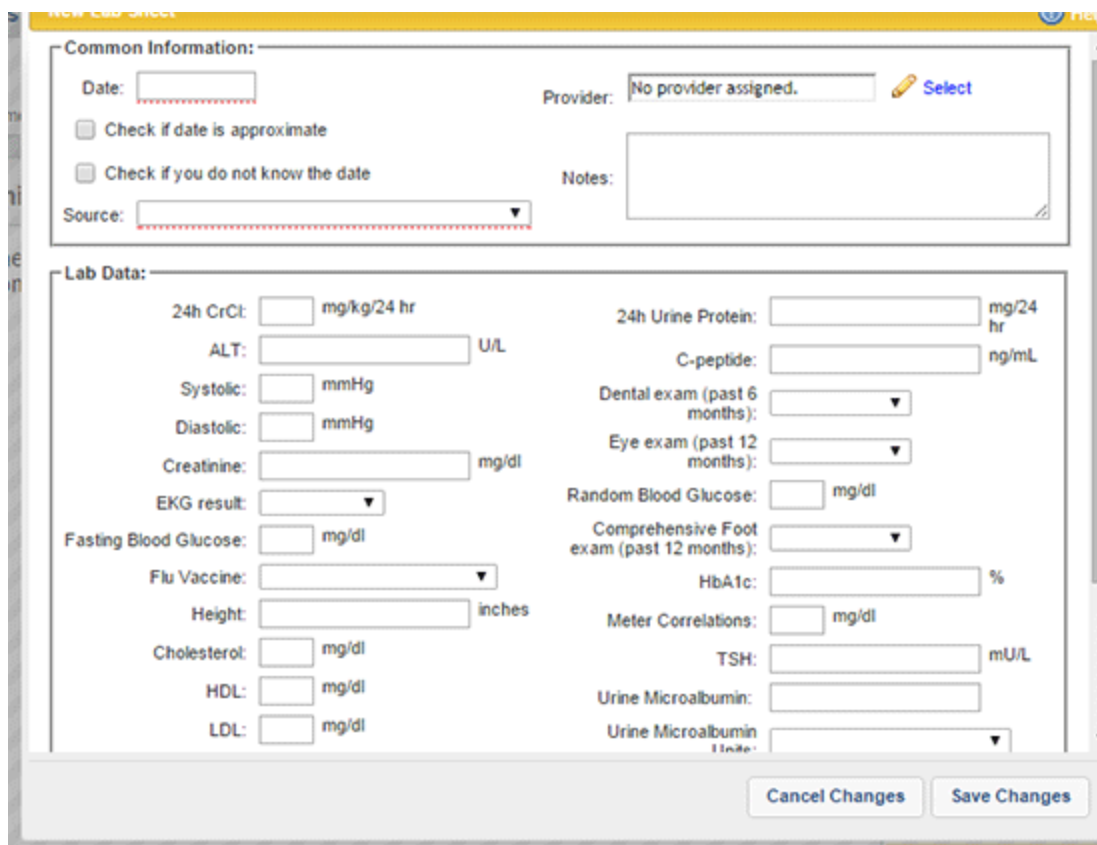
When you have entered all of the information, click the *Save Changes* button to save the test result. If the value you just entered is the most recent value for that test, then the new value will be displayed in the center table.



## Clinical Data and Labs - Adding multiple clinical data or lab test results using a Lab Sheet *Page 3 of 4*

If you are going to be entering multiple clinical data or lab test result values that all share the same common information you can use a *Lab Sheet* to speed the entry. Click the *New Lab Sheet* link in the upper right above the *Available Tests* lists.

**Note** that all of the data entered on the *Lab Sheet* will share the same Common Information. Also, when the Lab Sheet is saved, the individual test results are all stored individually- they're not stored as a single lab sheet..



The screenshot shows the 'New Lab Sheet' form. It is divided into two main sections: 'Common Information' and 'Lab Data'.

**Common Information:**

- Date:
- Provider:  [Select](#)
- ☐ Check if date is approximate
- ☐ Check if you do not know the date
- Source:
- Notes:

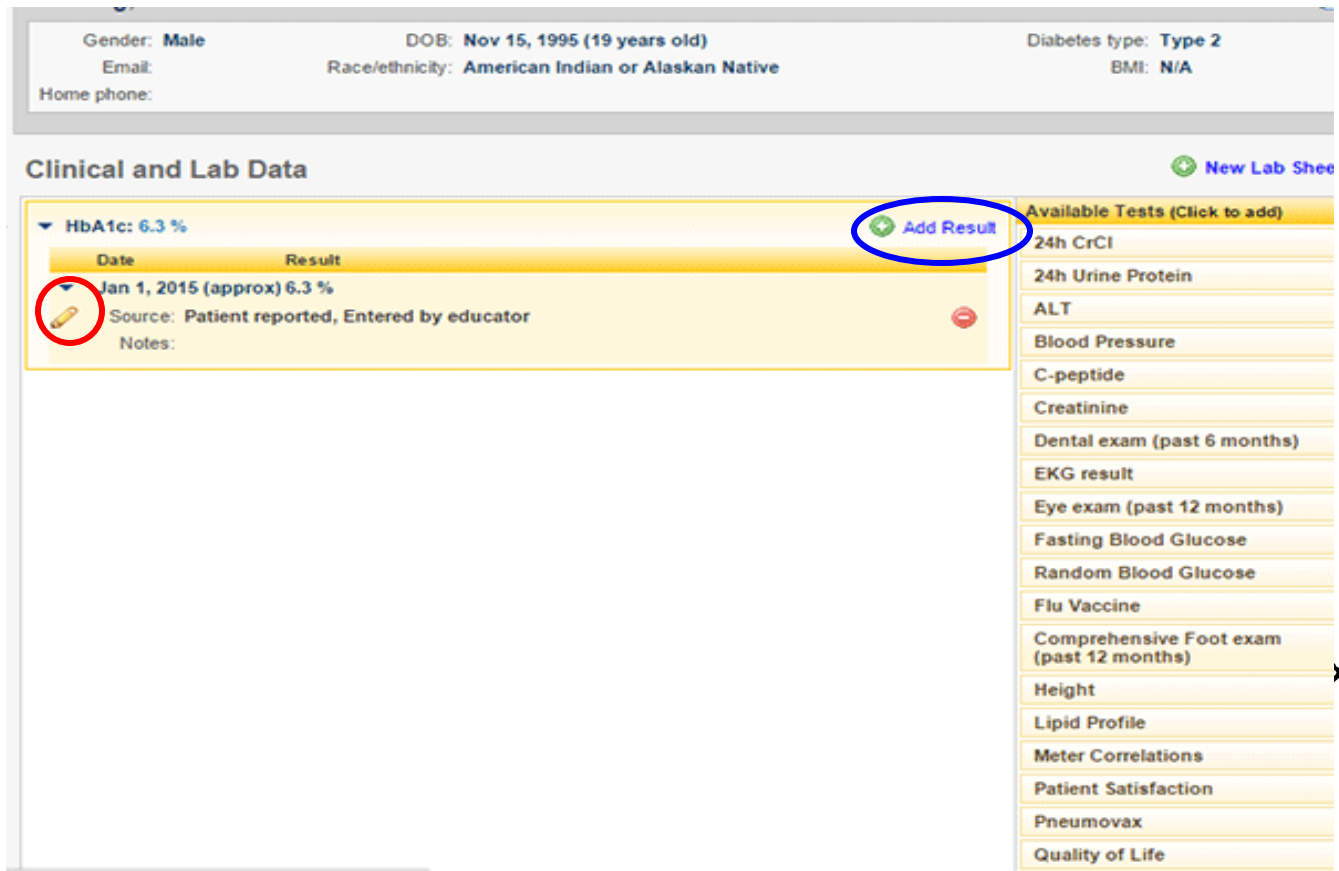
**Lab Data:**

24h CrCl: <input type="text"/> mg/kg/24 hr	24h Urine Protein: <input type="text"/> mg/24 hr
ALT: <input type="text"/> U/L	C-peptide: <input type="text"/> ng/mL
Systolic: <input type="text"/> mmHg	Dental exam (past 6 months): <input type="text"/>
Diastolic: <input type="text"/> mmHg	Eye exam (past 12 months): <input type="text"/>
Creatinine: <input type="text"/> mg/dl	Random Blood Glucose: <input type="text"/> mg/dl
EKG result: <input type="text"/>	Comprehensive Foot exam (past 12 months): <input type="text"/>
Fasting Blood Glucose: <input type="text"/> mg/dl	HbA1c: <input type="text"/> %
Flu Vaccine: <input type="text"/>	Meter Correlations: <input type="text"/> mg/dl
Height: <input type="text"/> inches	TSH: <input type="text"/> mU/L
Cholesterol: <input type="text"/> mg/dl	Urine Microalbumin: <input type="text"/>
HDL: <input type="text"/> mg/dl	Urine Microalbumin Test: <input type="text"/>
LDL: <input type="text"/> mg/dl	

At the bottom right, there are two buttons: [Cancel Changes](#) and [Save Changes](#).

## Clinical Data and Labs - Editing or deleting an existing test result *Page 4 of 4*

To edit an existing test result, begin by clicking on the test in the main middle section, which will expand the test down to reveal the historical results. Click on the specific test result that you'd like to edit (which will expand that individual result) and then click the **Edit pencil icon**. This will open the *Edit Lab* window where you can make any necessary corrections and click the *Save Changes* button. To add a result to an existing lab value, click on the **Add Result** link next to the appropriate lab entry.



The screenshot displays the 'Clinical and Lab Data' section of a patient's record. At the top, patient information is shown: Gender: Male, DOB: Nov 15, 1995 (19 years old), Race/ethnicity: American Indian or Alaskan Native, Diabetes type: Type 2, BMI: N/A. Below this, the 'Clinical and Lab Data' section is visible. It includes a dropdown for 'HbA1c: 6.3 %' and a table of historical results. The first row shows a result for 'Jan 1, 2015 (approx) 6.3 %' with a source of 'Patient reported, Entered by educator'. A red circle highlights the 'Edit pencil icon' next to this result. To the right of the table, there is a list of 'Available Tests (Click to add)' including 24h CrCl, 24h Urine Protein, ALT, Blood Pressure, C-peptide, Creatinine, Dental exam (past 6 months), EKG result, Eye exam (past 12 months), Fasting Blood Glucose, Random Blood Glucose, Flu Vaccine, Comprehensive Foot exam (past 12 months), Height, Lipid Profile, Meter Correlations, Patient Satisfaction, Pneumovax, and Quality of Life. A green circle highlights the 'Add Result' button at the top right of the table.

Date	Result
Jan 1, 2015 (approx)	6.3 %

Source: Patient reported, Entered by educator

Notes:

**Add Result**

**Available Tests (Click to add)**

- 24h CrCl
- 24h Urine Protein
- ALT
- Blood Pressure
- C-peptide
- Creatinine
- Dental exam (past 6 months)
- EKG result
- Eye exam (past 12 months)
- Fasting Blood Glucose
- Random Blood Glucose
- Flu Vaccine
- Comprehensive Foot exam (past 12 months)
- Height
- Lipid Profile
- Meter Correlations
- Patient Satisfaction
- Pneumovax
- Quality of Life

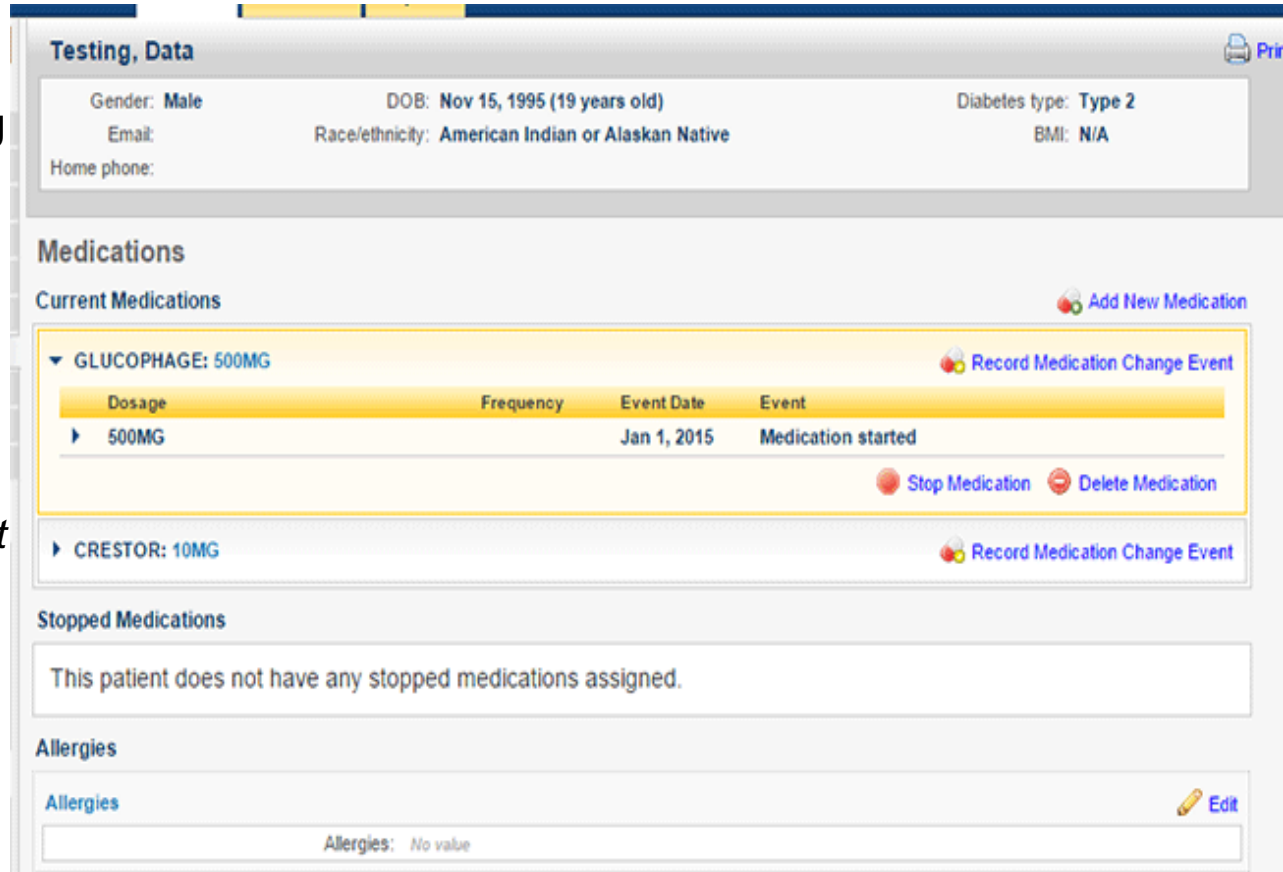


## Documenting Medications *Page 1 of 5*

Clicking the *Medications* tab from the left navigation pane displays a page that lists all of the medications that the patient is taking or was taking in the past. Each listing in the center table lists a medication and the most recent information about that medication. For new patient the center section will be empty.

By clicking on a specific medication line, the listing will expand down to reveal a complete history of *Medication Change Events* for that medication.

Clicking on a specific *Medication Change Event* will cause it to expand down and reveal any notes for that event.



The screenshot displays a patient portal interface. At the top, a header bar contains the text "Testing, Data" and a "Print" icon. Below this, a patient information section shows: Gender: Male, DOB: Nov 15, 1995 (19 years old), Diabetes type: Type 2, Email, Race/ethnicity: American Indian or Alaskan Native, BMI: N/A, and Home phone. The main section is titled "Medications" and includes a sub-section "Current Medications" with an "Add New Medication" button. Under "Current Medications", there are two medication entries: "GLUCOPHAGE: 500MG" and "CRESTOR: 10MG". Each entry has a "Record Medication Change Event" button. The "GLUCOPHAGE: 500MG" entry is expanded, showing a table with columns: Dosage, Frequency, Event Date, and Event. The table contains one row: Dosage: 500MG, Frequency: (blank), Event Date: Jan 1, 2015, Event: Medication started. Below the table are "Stop Medication" and "Delete Medication" buttons. The "CRESTOR: 10MG" entry is not expanded. Below the "Current Medications" section is a "Stopped Medications" section with a message: "This patient does not have any stopped medications assigned." At the bottom is an "Allergies" section with a sub-section "Allergies" and an "Edit" button. The "Allergies" sub-section contains the text "Allergies: No value".

Dosage	Frequency	Event Date	Event
500MG		Jan 1, 2015	Medication started

## Adding a medication *Page 2 of 5*

To enter a new medication, click the *Add New Medication* link (near the top right of the *Medications* page) to bring up the *Start New Medication* window. This box allows you to enter a new medication for this patient. The *Quick List* on the right contains medications that you've previously marked as a favorite (marked with solid stars) as well as other popular or recent medications (marked with empty stars). The boxes on the left allow you to select a medication that isn't already in your *Quick List*.

**Tip:** If the medication that you just entered is one that you believe you'll be using frequently, you can add it to the *Quick List* by clicking the link *Add medication to favorites* link next to the medication's name.

Start New Medication

Help

Medication:

Dosage / Strength:

Date:

☐ Date is approximate

☐ Do not know start date

Frequency:

Notes:

Quick List

☆ ASPIRIN

☆ CRESTOR

☆ GLUCOPHAGE

☆ LANTUS  
INSULIN GLARGINE RECOMBINANT

☆ METFORMIN HYDROCHLORIDE

☆ LISINAPRIL

☆ SIMVASTATIN

☆ GLIPIZIDE

☆ NOVOLOG  
INSULIN ASPART RECOMBINANT

☆ HUMALOG  
INSULIN LISPRO RECOMBINANT

☆ LIPITOR  
ATORVASTATIN CALCIUM

☆ JANUVIA  
SITAGLIPTIN PHOSPHATE

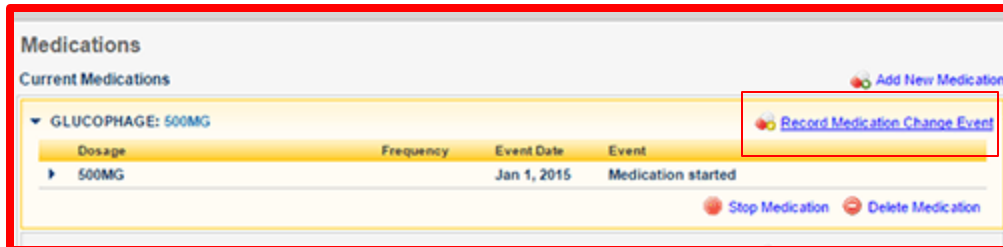
Cancel Changes

Save Changes



## Recording a medication change event *Page 3 of 5*

If a patient's prescribed medication regiment changes (e.g. the dosage or frequency of a medication that they are on is modified), you can document this information by recording a medication change event.



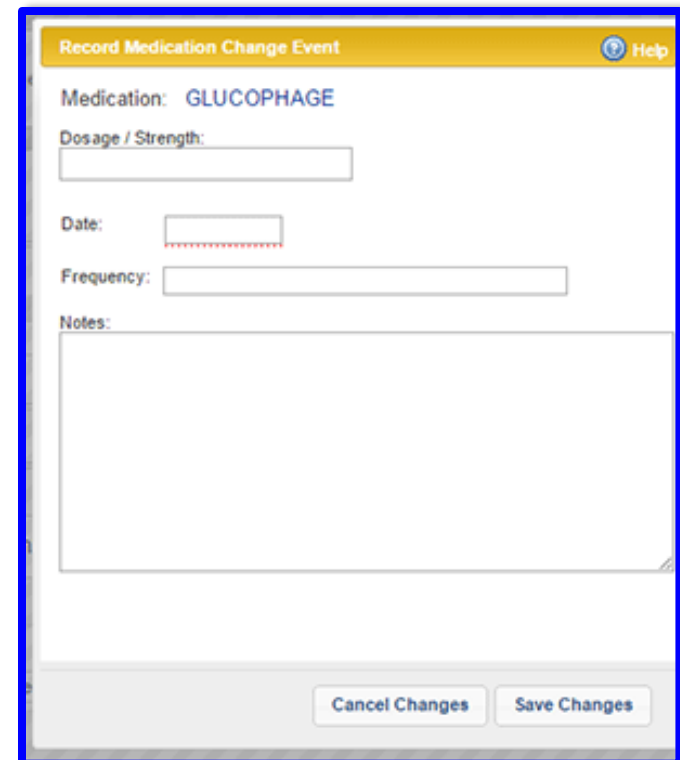
Medications

Current Medications Add New Medication

Dosage	Frequency	Event Date	Event
GLUCOPHAGE: 500MG			
500MG		Jan 1, 2015	Medication started

Record Medication Change Event Stop Medication Delete Medication

Click the **Record Medication Change Event** link to the right of the medication's name, which will bring up the **Record Medication Change Event window**. Here you can enter the date that the medication change event took place. Then enter the new dosage and frequency for the medication, and any notes that you'd like associated with the change of this medication.



Record Medication Change Event Help

Medication: GLUCOPHAGE

Dosage / Strength:

Date:

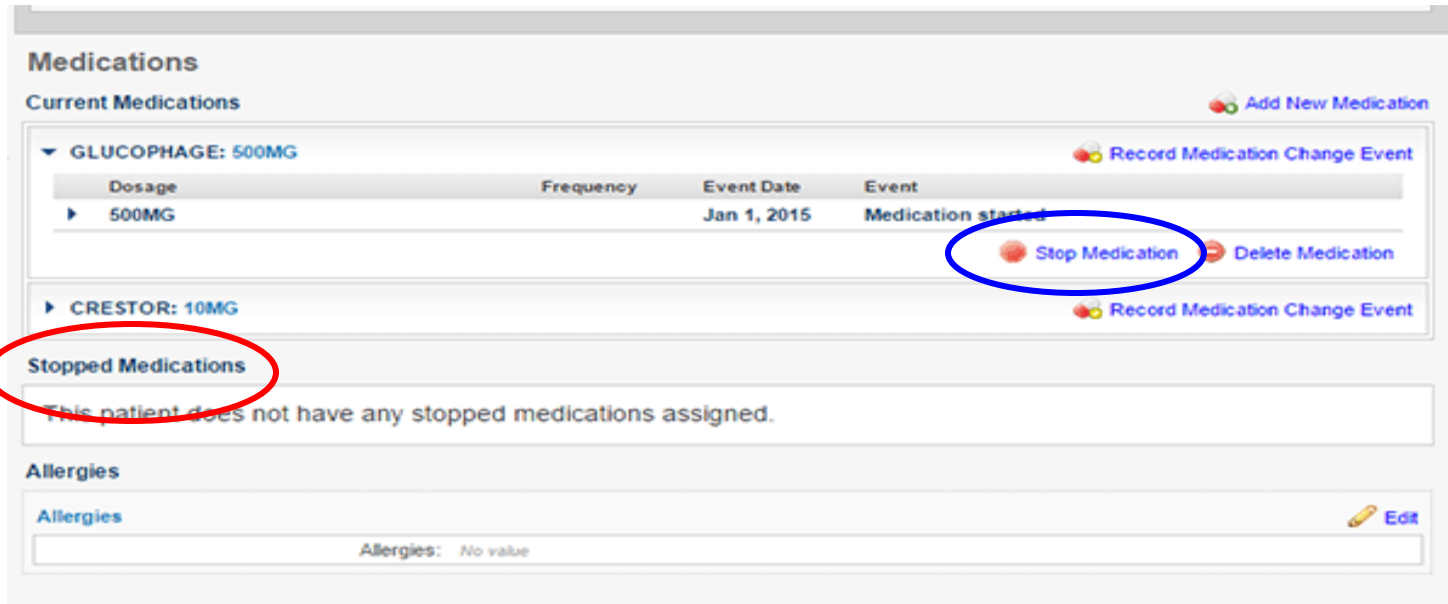
Frequency:

Notes:

Cancel Changes Save Changes

## Recording a **Stop** medication event *Page 4 of 5*

If a patient is no longer taking a medication that they had previously been prescribed, you can document this information by recording a stop medication event. Begin by clicking on the medication's name in the main medication table. Then click the **Stop Medication** link to bring up the *Stop Medication* window. Enter the date on which the patient stopped taking the medication and any associated notes. When you have entered all of the information, click the *Save Changes* button to save the stop medication event. You'll see that the medication has been removed from the *Current Medication* table down into the **Stopped Medications table**.



**Medications**

Current Medications Add New Medication

Dosage	Frequency	Event Date	Event
GLUCOPHAGE: 500MG			
500MG		Jan 1, 2015	Medication started
<span>Stop Medication</span> <span>Delete Medication</span>			
CRESTOR: 10MG			
<span>Record Medication Change Event</span>			

**Stopped Medications**

This patient does not have any stopped medications assigned.

**Allergies**

Allergies Edit

Allergies: No value

## **Creating a new (custom) medication** *Page 5 of 5*

If a patient is taking a medication that is not already in the database, you can manually add the medication to your site's medication database so that it will be available for future use.

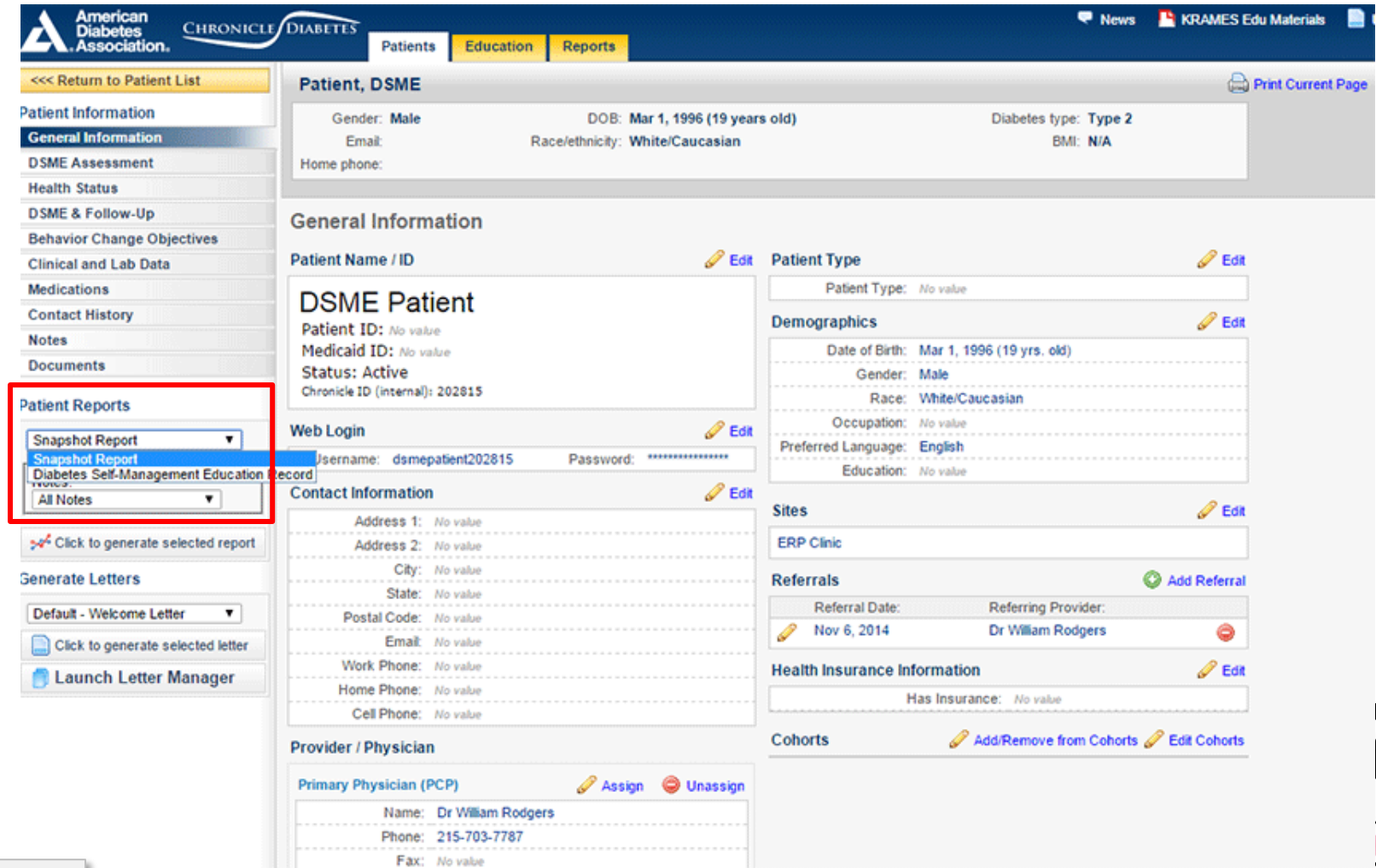
### **Begin by trying to add the medication to a patient's record**

- Click the **Add New Medication** button to bring up the Start New Medication window.
- Type in the Trade Name, and if the medication isn't already in the medication database you'll be presented with no matches but will have an option to click Add a new medication named [name]. Clicking this option will bring up a link that says Click to add "[name]" as a custom medication. Clicking that will add the medication you entered as a new medication in the database. From then on it will be available to all your site's educators in the medication's list in the future.



## Patient Reports *Page 1 of 3*

The **Snapshot Report** and the **DSME Record report** give an overview of the data about a specific patient. Both reports are generated through the **Patient Reports** section of the patient record.




The screenshot displays the American Diabetes Association patient record interface. The top navigation bar includes the American Diabetes Association logo, the text "CHRONICLE DIABETES", and tabs for "Patients", "Education", and "Reports". The "Reports" tab is active. On the left sidebar, the "Patient Reports" section is highlighted with a red box, showing a dropdown menu with options: "Snapshot Report", "Snapshot Report", "Diabetes Self-Management Education Record", and "All Notes". The main content area shows the "Patient, DSME" record for a male patient born on Mar 1, 1996 (19 years old), with Diabetes type: Type 2 and BMI: N/A. The "General Information" section includes fields for Patient Name / ID (DSME Patient), Patient ID, Medicaid ID, Status (Active), and Chronicle ID (202815). The "Web Login" section shows a username of dsmpatient202815 and a password field. The "Contact Information" section includes fields for Address 1, Address 2, City, State, Postal Code, Email, Work Phone, Home Phone, and Cell Phone. The "Provider / Physician" section shows the Primary Physician (PCP) as Dr. William Rodgers. The "Patient Type" section shows Patient Type: No value. The "Demographics" section shows Date of Birth: Mar 1, 1996 (19 yrs. old), Gender: Male, Race: White/Caucasian, Occupation: No value, Preferred Language: English, and Education: No value. The "Sites" section shows ERP Clinic. The "Referrals" section shows a referral date of Nov 6, 2014, and a referring provider of Dr. William Rodgers. The "Health Insurance Information" section shows Has Insurance: No value. The "Cohorts" section shows Add/Remove from Cohorts and Edit Cohorts options.

## Patient Reports *Page 2 of 3*


**The Snapshot Report** This report gives an overview of the data about a specific patient. The left column contains lists of the patient's current medications, recent interventions, topics that were covered during the educational sessions, and the patient's goals (and their change rate). The right column of the report contains clinical data, with historical values listed in a table and a graph displaying the change over time.

Diabetes: <b>Type 2</b>	Gender: <b>Male</b>	DOB: <b>3/1/1996 (19)</b>	Last edu. visit: <b>Apr 1, 2015</b>	Height: <b>N/A</b>	Weight: <b>188.00</b>	BMI: <b>N/A</b>	Waist: <b>N/A</b>	Referring Provider:
----------------------------	------------------------	------------------------------	--	-----------------------	--------------------------	--------------------	----------------------	---------------------

<b>Current Medications</b>		<b>HbA1c</b>							
Aspirin 81 MG									
allergies: No Data		<table border="1"> <thead> <tr> <th>Date</th> <th>Value(%)</th> </tr> </thead> <tbody> <tr> <td>A 4/16/2015</td> <td>6.0</td> </tr> <tr> <td>B 1/12/2015</td> <td>9.0</td> </tr> </tbody> </table>		Date	Value(%)	A 4/16/2015	6.0	B 1/12/2015	9.0
Date	Value(%)								
A 4/16/2015	6.0								
B 1/12/2015	9.0								

<b>Recent Interventions</b>		<b>Weight</b>							
<u>Intervention</u>	<u>Result / Date</u>								
Dental Exam	No Data	<table border="1"> <thead> <tr> <th>Date</th> <th>Value(pounds)</th> </tr> </thead> <tbody> <tr> <td>A 4/15/2015</td> <td>188.00</td> </tr> <tr> <td>B 12/15/2014</td> <td>233.00</td> </tr> </tbody> </table>		Date	Value(pounds)	A 4/15/2015	188.00	B 12/15/2014	233.00
Date	Value(pounds)								
A 4/15/2015	188.00								
B 12/15/2014	233.00								
Eye Exam	No Data								
Foot Exam	No Data								
Urine Protein	No Data								
Urine microalb	No Data								
Flu Vaccine	No Data								
Pneumonia Vaccine	No Data								
EKG	No Data								

<b>Educational Topics Addressed</b>		<b>Blood Pressure</b>	
<u>Topic</u>	<u>Most recently covered</u>	No data available	
Disease Process	4/01/2015		
Nutritional Management	4/01/2015		
Being Active	4/01/2015		
Taking medications	4/01/2015		
Monitoring	4/01/2015		
Acute complications	4/01/2015		
Chronic complication	4/01/2015		
Psychosocial Adjustment	4/01/2015		
Promote health	4/01/2015		

<b>Behavior Change Objectives</b>		<b>Cholesterol - Total and HDL</b>	
<u>Objective</u>	<u>Current Level</u>	<u>Assessed</u>	No data available
Test	75% (Most)	4/14/2015	
Monitor two times a day, AM & PM	100% (All)	3/31/2015	

<b>DSMS Plan</b>		<b>Cholesterol - LDL and Trigs</b>	
None		No data available	

## Patient Reports *Page 3 of 3*

The **DSME Record report** contains the information that was documented for the patient's educational session(s). This includes the pre assessment and post evaluation of the patient's ability in the nine ADA topic/learning objectives, class methods and materials, barriers and DSMS plan. All of the educational information included in this report will represent the most current information documented in Chronicle.

**Diabetes Self-Management Education Record**

Topics/Learning Objectives	Pre-Session Assessment	Comments	Instr. Date	Post-Session Evaluation	Comments
Diabetes disease process and Treatment options	<b>1</b>		04/01/2015	<b>3</b>	
Incorporating nutritional management into lifestyle	<b>2</b>		04/01/2015	<b>4</b>	
Incorporating physical activity into lifestyle	<b>2</b>		04/01/2015	<b>3</b>	
Using medications safely	<b>1</b>		04/01/2015	<b>4</b>	
Monitoring blood glucose, interpreting and using results	<b>1</b>		04/01/2015	<b>4</b>	
Prevention, detection and treatment of acute complications	<b>1</b>		04/01/2015	<b>3</b>	
Prevention, detection and treatment of chronic complications	<b>1</b>		04/01/2015	<b>3</b>	
Developing strategies to address psychosocial issues	<b>2</b>		04/01/2015	<b>4</b>	
Developing strategies to promote health/change behavior	<b>2</b>		04/01/2015	<b>4</b>	

Ratings: 1=Needs instruction 2=Needs review 3= Comprehends key points 4= Demonstrates competency NA=Not applicable

### Education plan:

---



---

### Instruction Method:

Lecture/Discussion, Demonstration (Source: Assessment (12/01/2014))

---



---

### Education Materials/Equipment Provided:

Computer aided (Interactive) (Source: Assessment (12/01/2014))

---



---

### Identified Barriers to learning/adherence to self management plan:

---



---

### DSMS Plan:

☐ Diabetes Forecast- 800-342-2383- [www.diabetesforecast.org](http://www.diabetesforecast.org) ☐ Diabetes Self-Management- 855-367-4813- [www.diabetesselfmanagement.com](http://www.diabetesselfmanagement.com) (Source: Assessment (12/1/14))

---

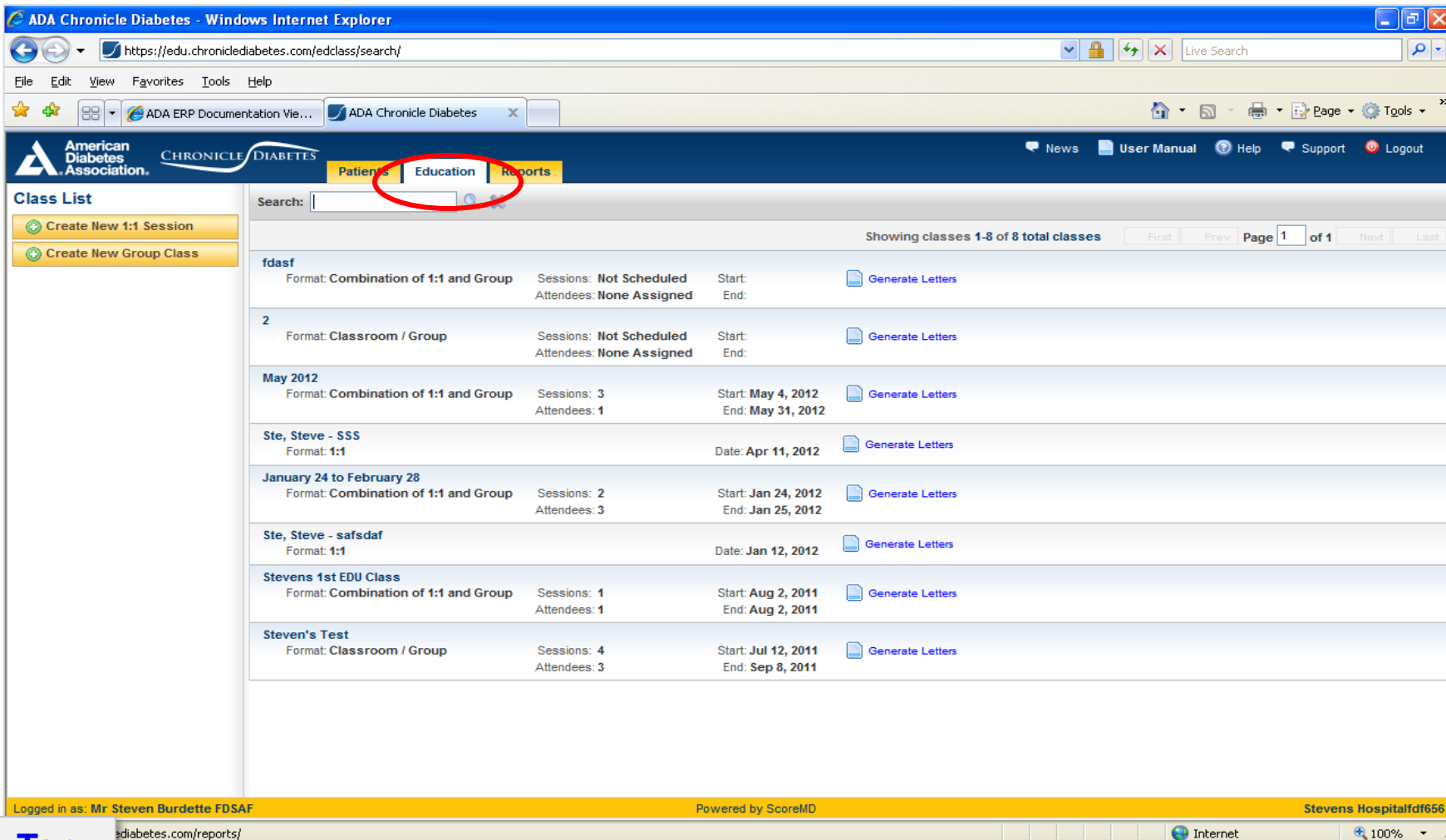


---

## Module 2: Creating/Managing Classes & Documenting Education

### Creating a 1:1 or Group Class: Page 1 of 7

1. Click on the **Education tab** at the top of the page. You will see a list of existing classes, along with basic information about the class.



The screenshot shows the ADA Chronicle Diabetes website in a Windows Internet Explorer browser. The URL is <https://edu.chronicdiabetes.com/edclass/search/>. The website has a navigation bar with tabs for Patients, Education, and Reports. The Education tab is selected and circled in red. Below the navigation bar, there is a search bar and a "Class List" section. The Class List section has two buttons: "Create New 1:1 Session" and "Create New Group Class". The main content area displays a list of classes, showing classes 1-8 of 8 total classes. The classes are listed in a table format with columns for class name, format, sessions, attendees, start/end dates, and a "Generate Letters" link.

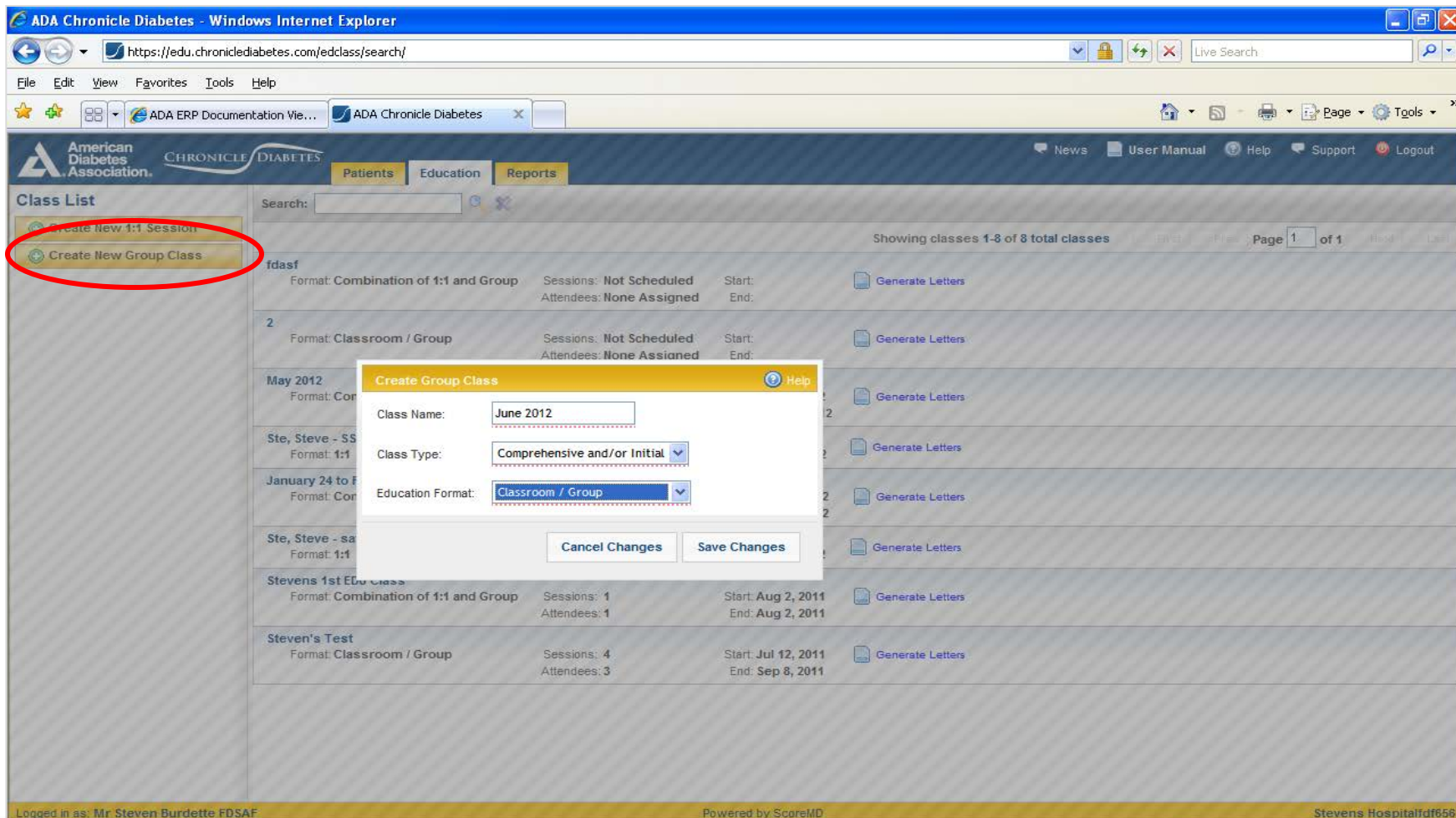
Class Name	Format	Sessions	Attendees	Start/End	Generate Letters
fdasf	Combination of 1:1 and Group	Not Scheduled	None Assigned		<a href="#">Generate Letters</a>
2	Classroom / Group	Not Scheduled	None Assigned		<a href="#">Generate Letters</a>
May 2012	Combination of 1:1 and Group	3	1	May 4, 2012 May 31, 2012	<a href="#">Generate Letters</a>
Ste, Steve - SSS	1:1			Apr 11, 2012	<a href="#">Generate Letters</a>
January 24 to February 28	Combination of 1:1 and Group	2	3	Jan 24, 2012 Jan 25, 2012	<a href="#">Generate Letters</a>
Ste, Steve - safsdaf	1:1			Jan 12, 2012	<a href="#">Generate Letters</a>
Stevens 1st EDU Class	Combination of 1:1 and Group	1	1	Aug 2, 2011 Aug 2, 2011	<a href="#">Generate Letters</a>
Steven's Test	Classroom / Group	4	3	Jul 12, 2011 Sep 8, 2011	<a href="#">Generate Letters</a>

Logged in as: Mr Steven Burdette FDSAF  
Powered by ScoreMD  
Stevens Hospitaldf656



## Creating a 1:1 or Group Class: *Page 2 of 7*

2. Click **Create New Class** on the left side of the page to bring up the window. Enter a name for the class. Examples could be "June 2012" or "June 2012 Friday AM". Choose a name that you will logically associate with this class. Enter the Class Type and Education Format and click Save Changes.



The screenshot shows the ADA Chronicle Diabetes system interface. The 'Class List' section on the left has two buttons: 'Create New 1:1 Session' and 'Create New Group Class'. The 'Create New Group Class' button is circled in red. A dialog box titled 'Create Group Class' is open, showing the following fields:

- Class Name: June 2012
- Class Type: Comprehensive and/or Initial
- Education Format: Classroom / Group

The dialog box has 'Cancel Changes' and 'Save Changes' buttons. The background shows a table of existing classes with columns for Class Name, Format, Sessions, Attendees, Start, End, and Generate Letters.

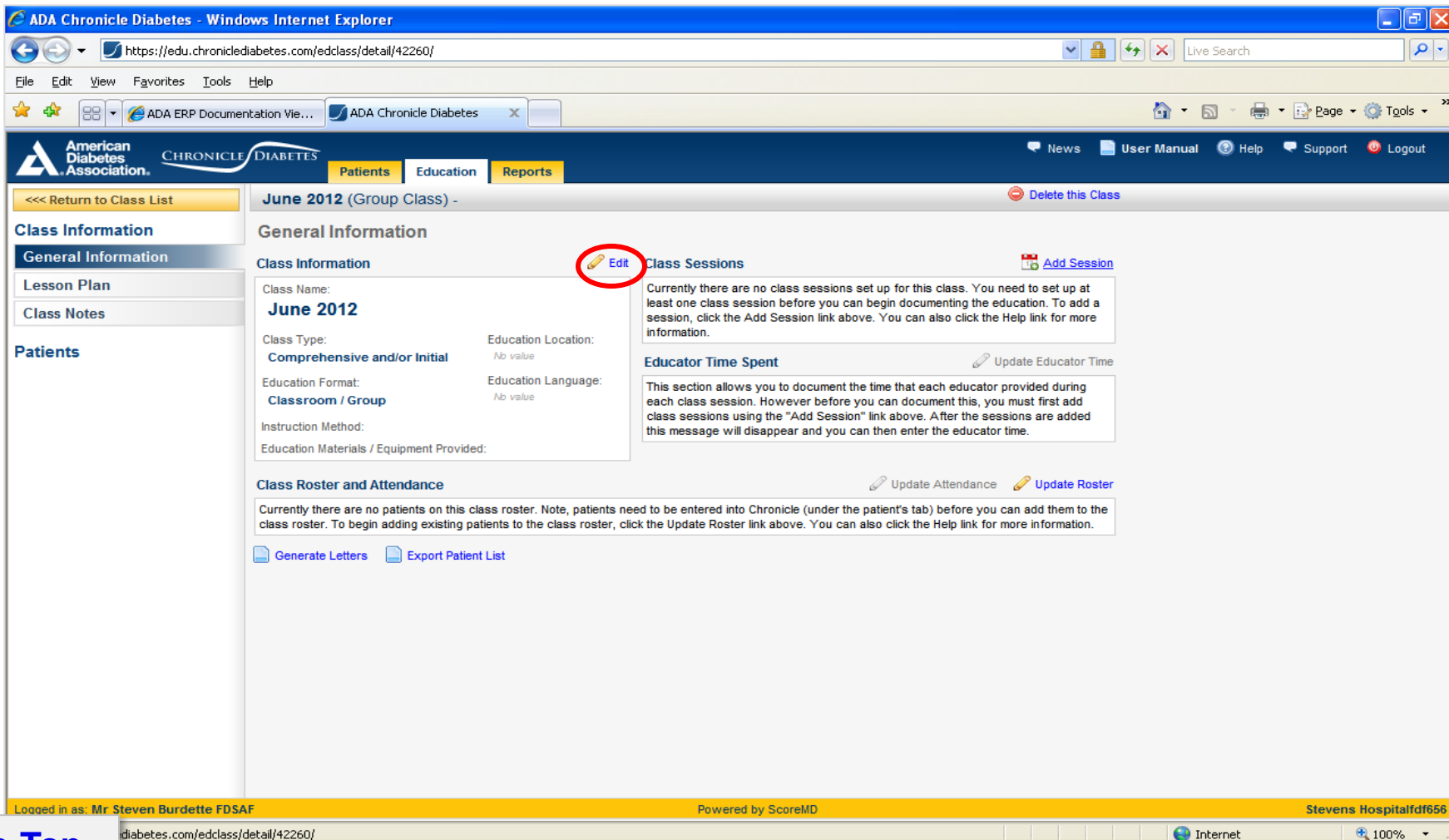
Class Name	Format	Sessions	Attendees	Start	End	Generate Letters
fdasf	Format: Combination of 1:1 and Group	Sessions: Not Scheduled	Attendees: None Assigned	Start:	End:	<a href="#">Generate Letters</a>
2	Format: Classroom / Group	Sessions: Not Scheduled	Attendees: None Assigned	Start:	End:	<a href="#">Generate Letters</a>
May 2012	Format: Cor					<a href="#">Generate Letters</a>
Ste, Steve - SS	Format: 1:1					<a href="#">Generate Letters</a>
January 24 to F	Format: Cor					<a href="#">Generate Letters</a>
Ste, Steve - sa	Format: 1:1					<a href="#">Generate Letters</a>
Stevens 1st Edu Class	Format: Combination of 1:1 and Group	Sessions: 1	Attendees: 1	Start: Aug 2, 2011	End: Aug 2, 2011	<a href="#">Generate Letters</a>
Steven's Test	Format: Classroom / Group	Sessions: 4	Attendees: 3	Start: Jul 12, 2011	End: Sep 8, 2011	<a href="#">Generate Letters</a>

Logged in as: Mr Steven Burdette FDSAF  
Powered by ScoreMD  
Stevens Hospitaldf656



## Creating a 1:1 or Group Class: Page 3 of 7

3. Once you have created a new class, you can begin by adding the general class information by clicking the **Edit** pencil link above the Class Information box.

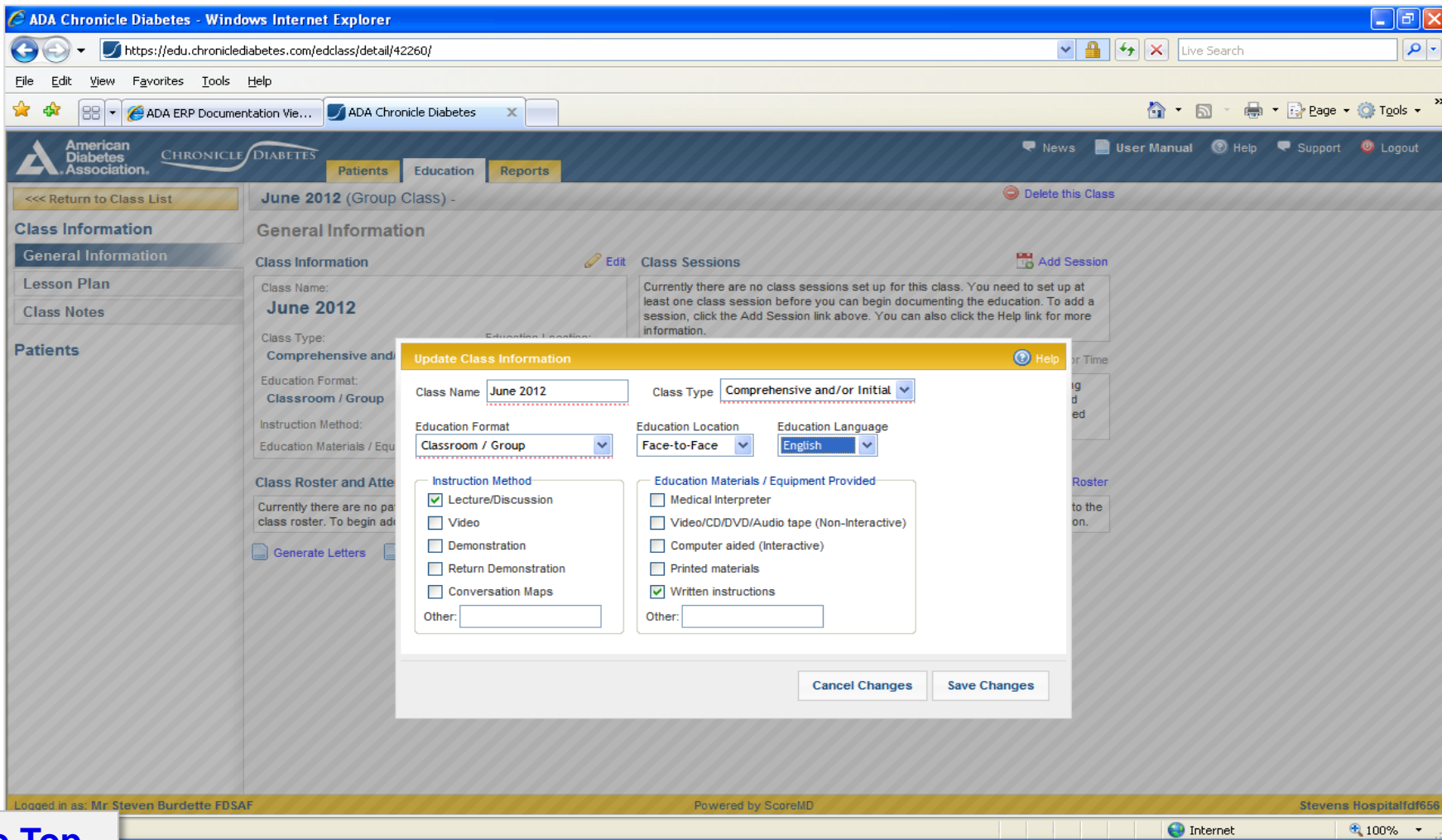


The screenshot shows the ADA Chronicle Diabetes website interface. The browser window is titled "ADA Chronicle Diabetes - Windows Internet Explorer" and the address bar shows "https://edu.chronicdiabetes.com/edclass/detail/42260/". The website has a navigation bar with "Patients", "Education", and "Reports" tabs. The left sidebar contains links for "Class Information", "General Information", "Lesson Plan", "Class Notes", and "Patients". The main content area is titled "June 2012 (Group Class) -" and includes a "Delete this Class" link. The "Class Information" section is highlighted, and the "Edit" pencil link is circled in red. The "Class Sessions" section contains a message about adding sessions. The "Educator Time Spent" section contains a message about documenting time. The "Class Roster and Attendance" section contains a message about adding patients. The footer shows the user is logged in as "Mr Steven Burdette FDSA" and the page is powered by "ScoreMD".

ADA Chronicle Diabetes - Windows Internet Explorer  
https://edu.chronicdiabetes.com/edclass/detail/42260/  
File Edit View Favorites Tools Help  
ADA ERP Documentation Vie... ADA Chronicle Diabetes x  
News User Manual Help Support Logout  
American Diabetes Association. CHRONICLE DIABETES  
Patients Education Reports  
<<< Return to Class List June 2012 (Group Class) - Delete this Class  
Class Information  
General Information  
Lesson Plan  
Class Notes  
Patients  
General Information  
Class Information **Edit** Class Sessions Add Session  
Class Name: June 2012  
Class Type: Comprehensive and/or Initial Education Location: No value  
Education Format: Classroom / Group Education Language: No value  
Instruction Method:  
Education Materials / Equipment Provided:  
Currently there are no class sessions set up for this class. You need to set up at least one class session before you can begin documenting the education. To add a session, click the Add Session link above. You can also click the Help link for more information.  
Educator Time Spent Update Educator Time  
This section allows you to document the time that each educator provided during each class session. However before you can document this, you must first add class sessions using the "Add Session" link above. After the sessions are added this message will disappear and you can then enter the educator time.  
Class Roster and Attendance Update Attendance Update Roster  
Currently there are no patients on this class roster. Note, patients need to be entered into Chronicle (under the patient's tab) before you can add them to the class roster. To begin adding existing patients to the class roster, click the Update Roster link above. You can also click the Help link for more information.  
Generate Letters Export Patient List  
Logged in as: Mr Steven Burdette FDSA Powered by ScoreMD Stevens Hospital/fdf656  
diabetes.com/edclass/detail/42260/ Internet 100%

## Creating a 1:1 or Group Class: Page 4 of 7

4. Enter the Location, Language, instruction methods and any materials you are using, and then click Save Changes.



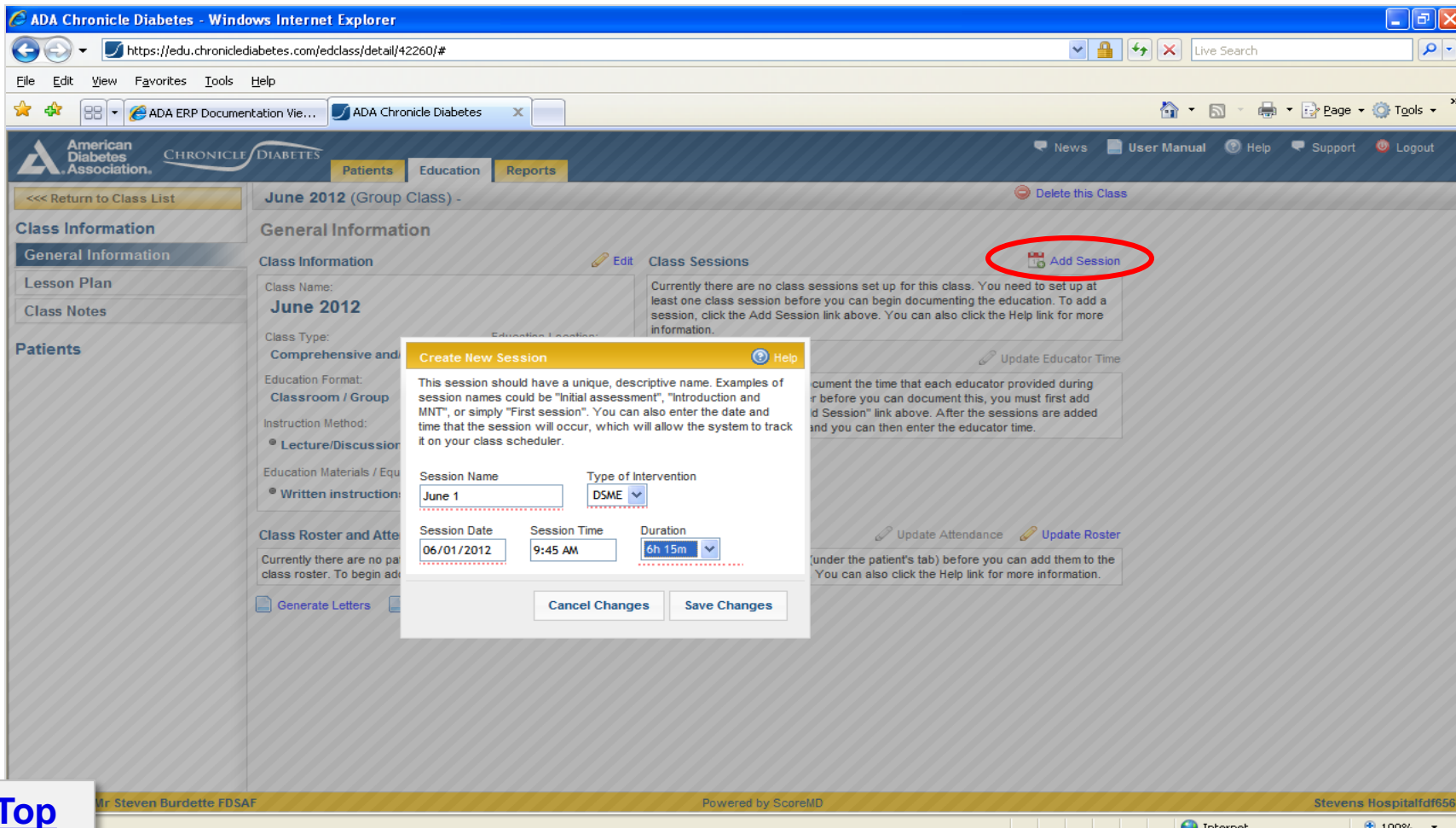
The screenshot shows the ADA Chronicle Diabetes website interface. The main content area displays the 'General Information' for a class named 'June 2012'. The 'Update Class Information' dialog box is open, allowing for editing the class details. The dialog box contains the following fields and options:

- Class Name:** June 2012
- Class Type:** Comprehensive and/or Initial (dropdown menu)
- Education Format:** Classroom / Group (dropdown menu)
- Education Location:** Face-to-Face (dropdown menu)
- Education Language:** English (dropdown menu)
- Instruction Method:**
  - ☒ Lecture/Discussion
  - ☐ Video
  - ☐ Demonstration
  - ☐ Return Demonstration
  - ☐ Conversation Maps
  - Other:
- Education Materials / Equipment Provided:**
  - ☐ Medical Interpreter
  - ☐ Video/CD/DVD/Audio tape (Non-Interactive)
  - ☐ Computer aided (Interactive)
  - ☐ Printed materials
  - ☒ Written instructions
  - Other:

At the bottom of the dialog box, there are two buttons: 'Cancel Changes' and 'Save Changes'.

## Creating a 1:1 or Group Class: Page 5 of 7

5. Each class must have one or more sessions. A class that meets three times over the month of June will have three sessions. **Click the Add Sessions link** above the Class Schedule box to bring up the entry window. Enter a name for the session. Choose a name that you will logically associate with your class session. For example: "Welcome and Intro", "Pumps and Meters", or simply "Class 1".



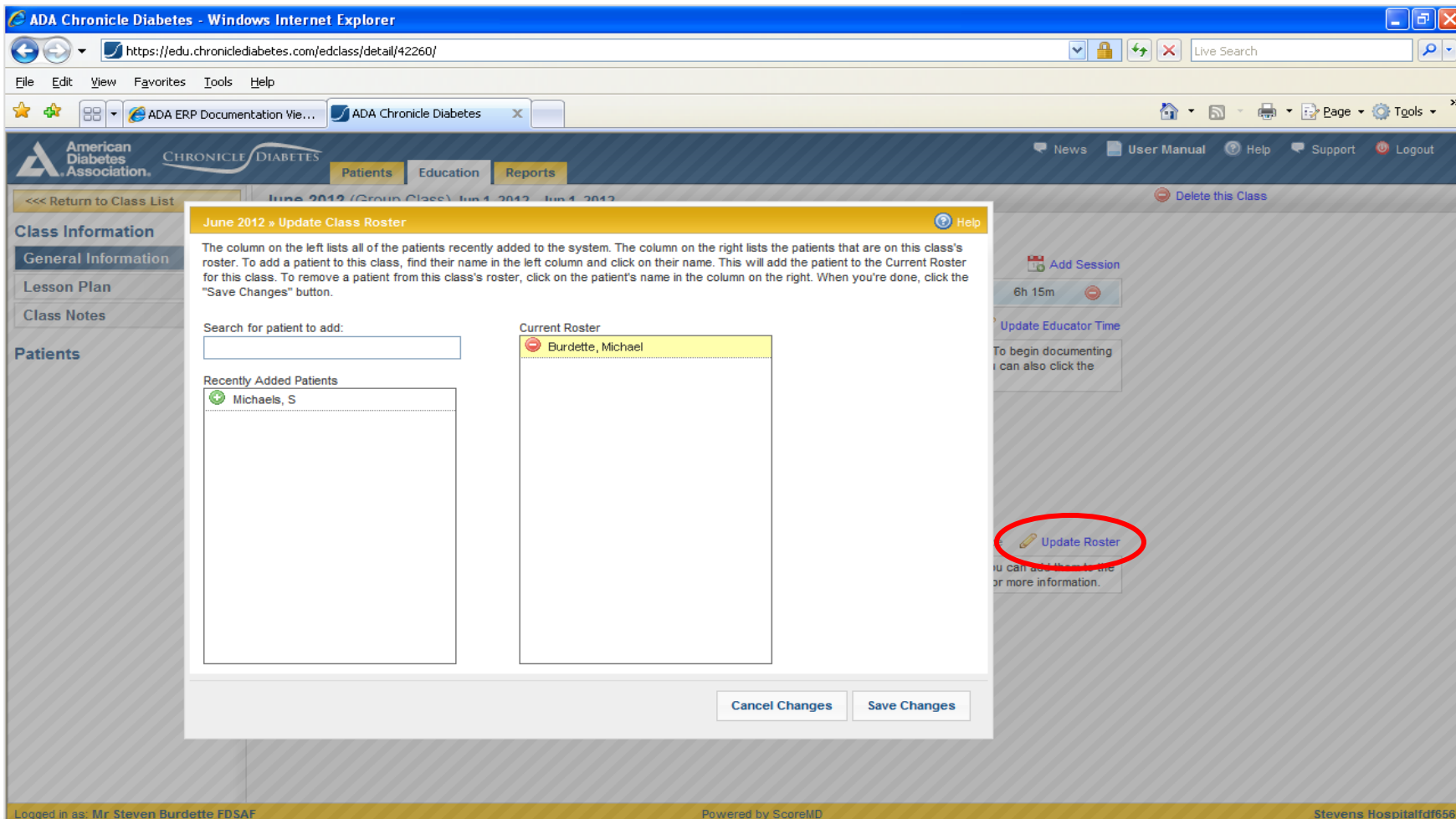
The screenshot shows the ADA Chronicle Diabetes web application in a Windows Internet Explorer browser. The URL is <https://edu.chronicdiabetes.com/edclass/detail/42260/#>. The page displays the 'June 2012 (Group Class)' details. A red circle highlights the 'Add Session' link in the top right corner. A 'Create New Session' dialog box is open, prompting the user to enter session details. The dialog box contains the following fields:

- Session Name:** June 1
- Type of Intervention:** DSME
- Session Date:** 06/01/2012
- Session Time:** 9:45 AM
- Duration:** 6h 15m

The dialog box also includes 'Cancel Changes' and 'Save Changes' buttons. The background page shows the 'Class Information' tab selected, with a 'General Information' section. The 'Class Name' is 'June 2012'. The 'Class Type' is 'Comprehensive and'. The 'Education Format' is 'Classroom / Group'. The 'Instruction Method' is 'Lecture/Discussion'. The 'Education Materials / Equipment' section lists 'Written instruction'. The 'Class Roster and Attendance' section indicates that there are no patients in the class roster. The bottom of the page shows the user 'Mr Steven Burdette FDSA' and the text 'Powered by ScoreMD'.

## Creating a 1:1 or Group Class: *Page 6 of 7*

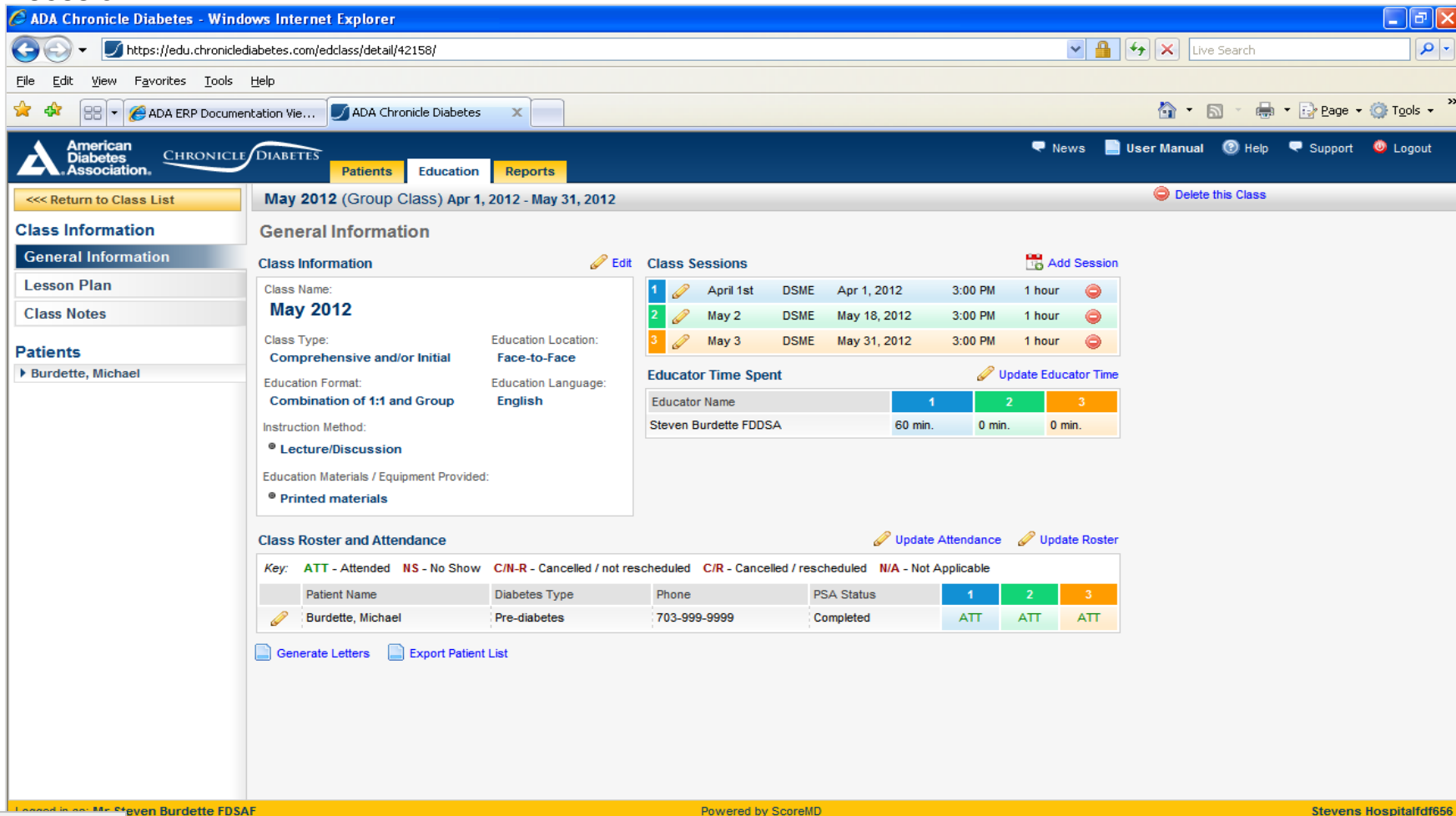
6. Above the Class Roster and Attendance box, click **Update Roster** to bring up the patient selector. In the left recently Added Patients list find each patient that will be in the class and click on the patient to move her to the Current Roster list. When you have selected all the patients in the class; click Save Changes.



The screenshot shows the ADA Chronicle Diabetes web application in a Windows Internet Explorer browser window. The address bar displays the URL: <https://edu.chronicdiabetes.com/edclass/detail/42260/>. The application interface includes a top navigation bar with links for News, User Manual, Help, Support, and Logout. Below this is a sidebar with links for Patients, Education, and Reports. The main content area displays the 'June 2012 » Update Class Roster' dialog box. This dialog box contains a search field for adding patients, a list of 'Recently Added Patients' (currently showing 'Michaels, S'), and a 'Current Roster' list (currently showing 'Burdette, Michael'). At the bottom of the dialog are 'Cancel Changes' and 'Save Changes' buttons. In the background, the 'Update Roster' button is circled in red.

## Creating a 1:1 or Group Class: Page 7 of 7

On the **General Information** page of the record, the Class Roster and Attendance table lists each patient's attendance. Each colored column represents a specific class session as listed in the Class Schedule section. **Note:** By default all patients are marked as being in attendance (ATT) at each session.



The screenshot shows the ADA Chronicle Diabetes interface in a Windows Internet Explorer browser. The URL is <https://edu.chronicdiabetes.com/edclass/detail/42158/>. The page title is "ADA Chronicle Diabetes - Windows Internet Explorer".

The interface includes a navigation bar with tabs for **Patients**, **Education**, and **Reports**. The **Education** tab is selected, showing the "May 2012 (Group Class) Apr 1, 2012 - May 31, 2012" record. A "Delete this Class" link is visible.

The left sidebar contains links for "Class Information", "General Information", "Lesson Plan", "Class Notes", "Patients", and "Burdette, Michael".

The main content area displays the "General Information" for the class. The "Class Information" section includes:

- Class Name:** May 2012
- Class Type:** Comprehensive and/or Initial
- Education Location:** Face-to-Face
- Education Format:** Combination of 1:1 and Group
- Education Language:** English
- Instruction Method:**
  - Lecture/Discussion
- Education Materials / Equipment Provided:**
  - Printed materials

The "Class Sessions" section shows a table of sessions:

Session	Date	Time	Duration
1	April 1st	3:00 PM	1 hour
2	May 2	3:00 PM	1 hour
3	May 3	3:00 PM	1 hour

The "Educator Time Spent" section shows a table of time spent by the educator:

Educator Name	1	2	3
Steven Burdette FDDSA	60 min.	0 min.	0 min.

The "Class Roster and Attendance" section shows a table of patient attendance:

Patient Name	Diabetes Type	Phone	PSA Status	1	2	3
Burdette, Michael	Pre-diabetes	703-999-9999	Completed	ATT	ATT	ATT

Legend: **ATT** - Attended, **NS** - No Show, **C/N-R** - Cancelled / not rescheduled, **C/R** - Cancelled / rescheduled, **N/A** - Not Applicable.

Links: [Generate Letters](#), [Export Patient List](#)

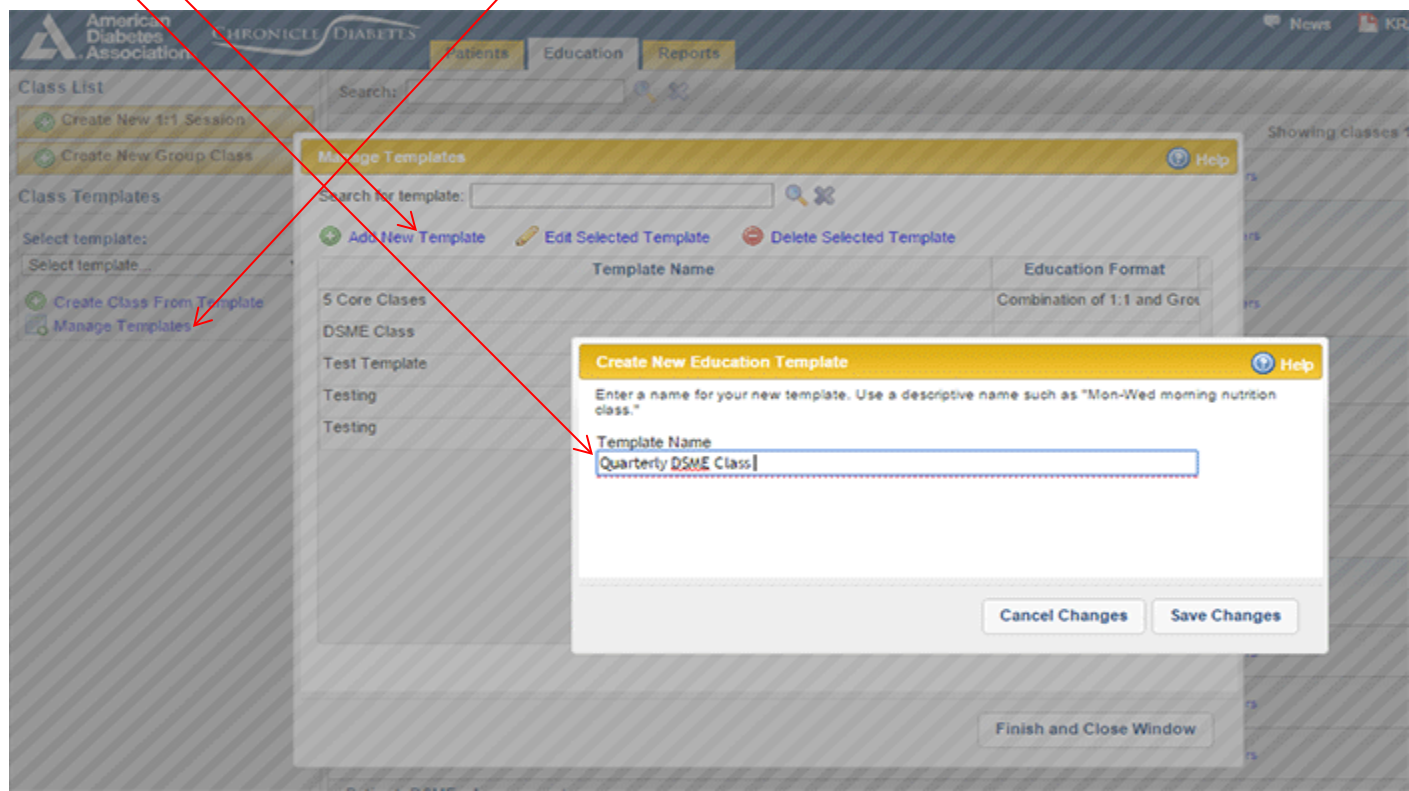
Footer: Logged in as: Mr Steven Burdette FDDSA, Powered by ScoreMD, Stevens Hospitaldf656

## Managing and Using Class Templates *Page 1 of 3*

Classes can be created “from scratch” or can be created from a class template that you can set up for a series of classes. In this section we will cover creating a class template and using that template to create a class.

### To create a new class template:

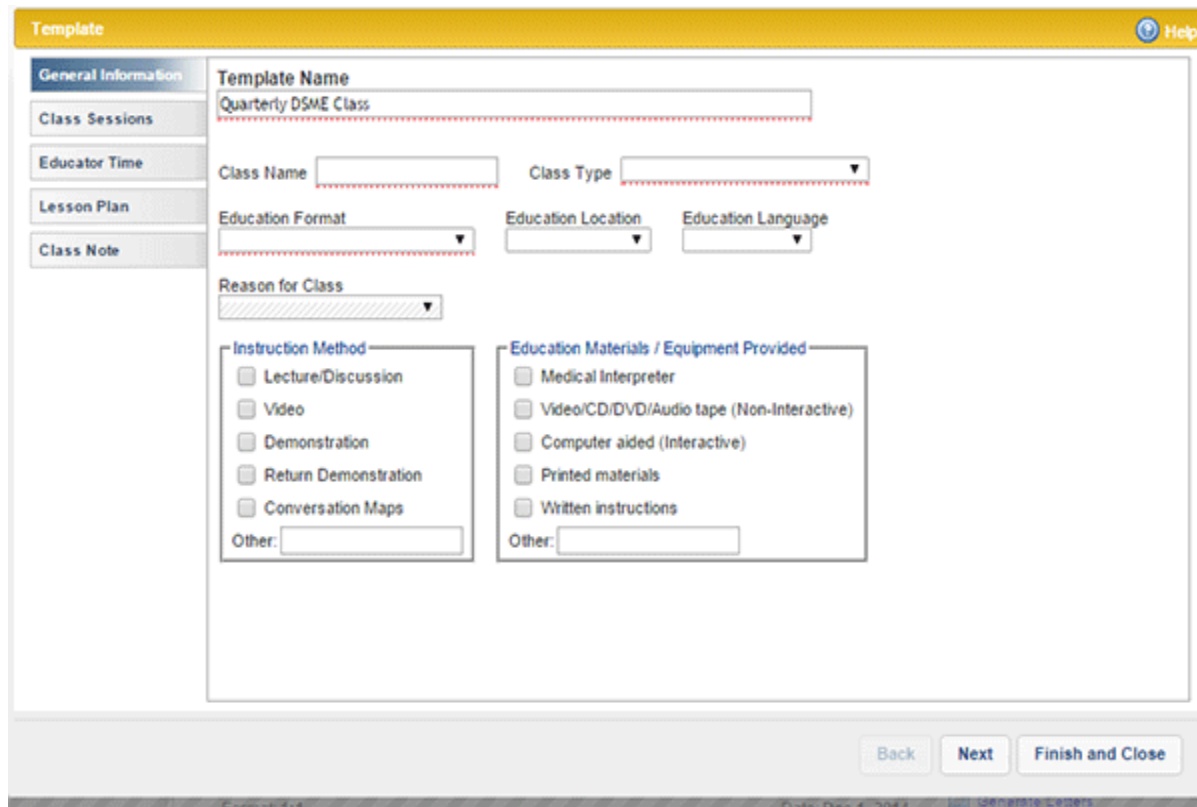
- 1) From the Education Tab, Click the **Manage Templates** link
- 2) Click Add **New Template**
- 3) **Enter the name of the template** i.e. Quarterly DSME Class, click Save Changes



## Managing and Using Class Templates *Page 2 of 3*

You will now be on the tab where you can define the *General Information* for the class. Fill as much information out on this tab as will be common to all classes created with this template. **Nothing is required** (other than the *Template Name*), but the more information you fill out, the more information will be pre-populated when you create the class.

**For example**, if all classes created with this template will share the same Class Type, Education Format, Location, and Language, (but will differ on the Education Materials provided), then fill out all of the common fields.



The screenshot shows a web-based form titled "Template" with a yellow header bar. On the left is a sidebar with tabs: "General Information" (selected), "Class Sessions", "Educator Time", "Lesson Plan", and "Class Note". The main content area is for "General Information" and contains the following fields:

- Template Name:** A text box containing "Quarterly DSME Class".
- Class Name:** An empty text box.
- Class Type:** A dropdown menu.
- Education Format:** A dropdown menu.
- Education Location:** A dropdown menu.
- Education Language:** A dropdown menu.
- Reason for Class:** A dropdown menu.
- Instruction Method:** A group box containing five checkboxes: "Lecture/Discussion", "Video", "Demonstration", "Return Demonstration", and "Conversation Maps". Below these is an "Other:" text box.
- Education Materials / Equipment Provided:** A group box containing five checkboxes: "Medical Interpreter", "Video/CD/DVD/Audio tape (Non-Interactive)", "Computer aided (Interactive)", "Printed materials", and "Written instructions". Below these is an "Other:" text box.

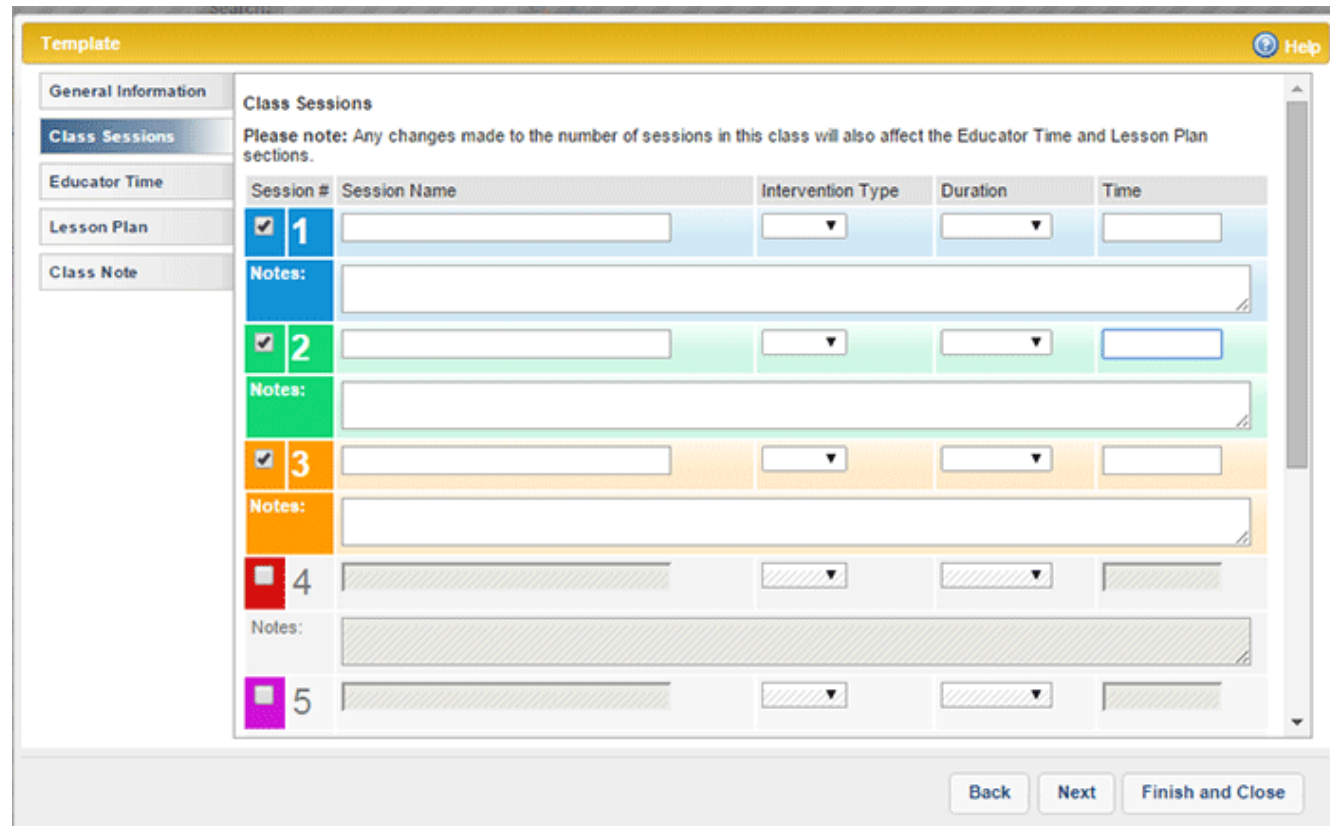
At the bottom right of the form are three buttons: "Back", "Next", and "Finish and Close".



## Managing and Using Class Templates *Page 3 of 3*

The **Class Sessions** tab allows you to define the sessions that each class will have. For each session give it a name, intervention type, duration, time, and a note. All of these are optional in the template, and can be added later when you're creating the class. The **Educator Time** tab allows you to define how much time each educator will contribute to each of the sessions. The **Lesson Plan** tab allows you to define which educational topics will be covered during each of the sessions. The **Class Note** tab allows you to enter a note that will apply to all patients in the class.

When you are done entering all of the information for the class template, click **Finish and Close**



**Template** Help

**General Information**

**Class Sessions**

Please note: Any changes made to the number of sessions in this class will also affect the Educator Time and Lesson Plan sections.

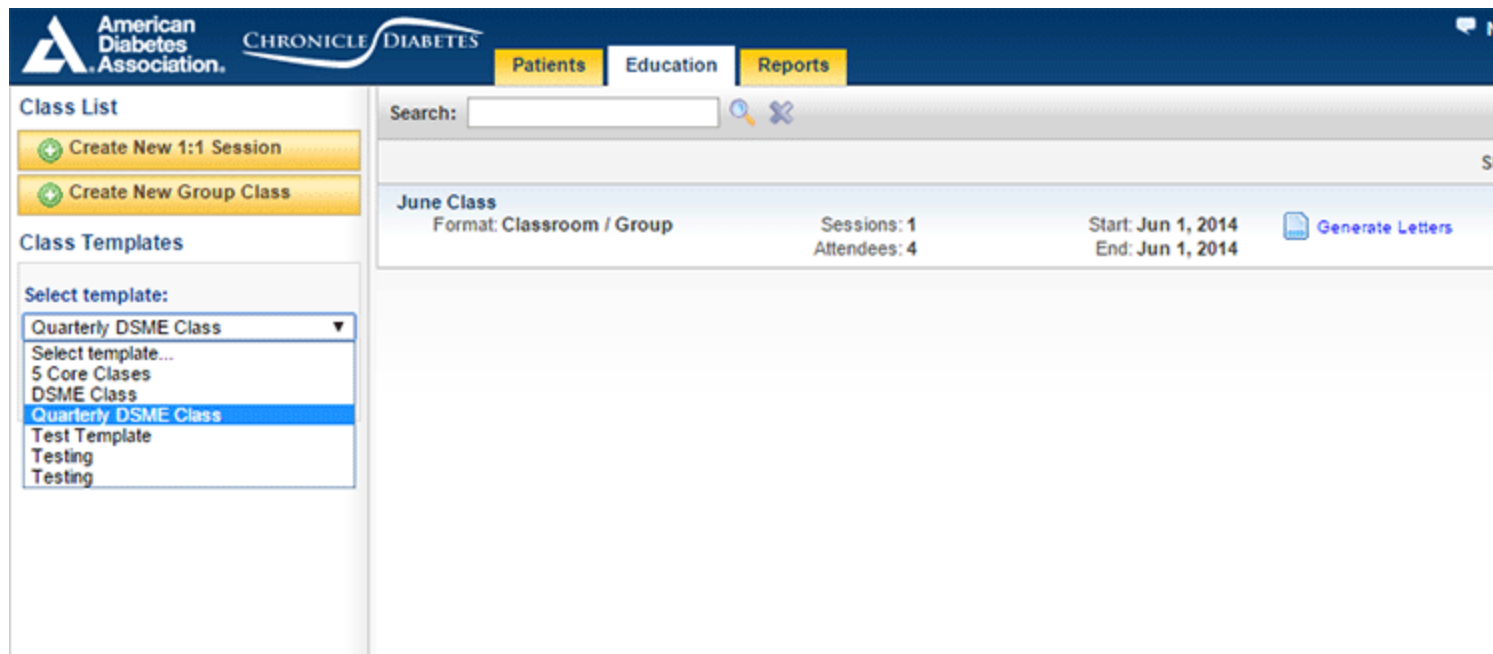
Session #	Session Name	Intervention Type	Duration	Time
<input checked="" type="checkbox"/> 1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Notes: <input type="text"/>				
<input checked="" type="checkbox"/> 2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Notes: <input type="text"/>				
<input checked="" type="checkbox"/> 3	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Notes: <input type="text"/>				
<input type="checkbox"/> 4	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Notes: <input type="text"/>				
<input type="checkbox"/> 5	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

[Back](#) [Next](#) [Finish and Close](#)



## Creating a new Class from a Class Template *Page 1 of 2*

To create a new class from an existing class template, select the class template from the dropdown list in the **Class Templates** section of the left navigation pane, then click **Create Class From Template**.



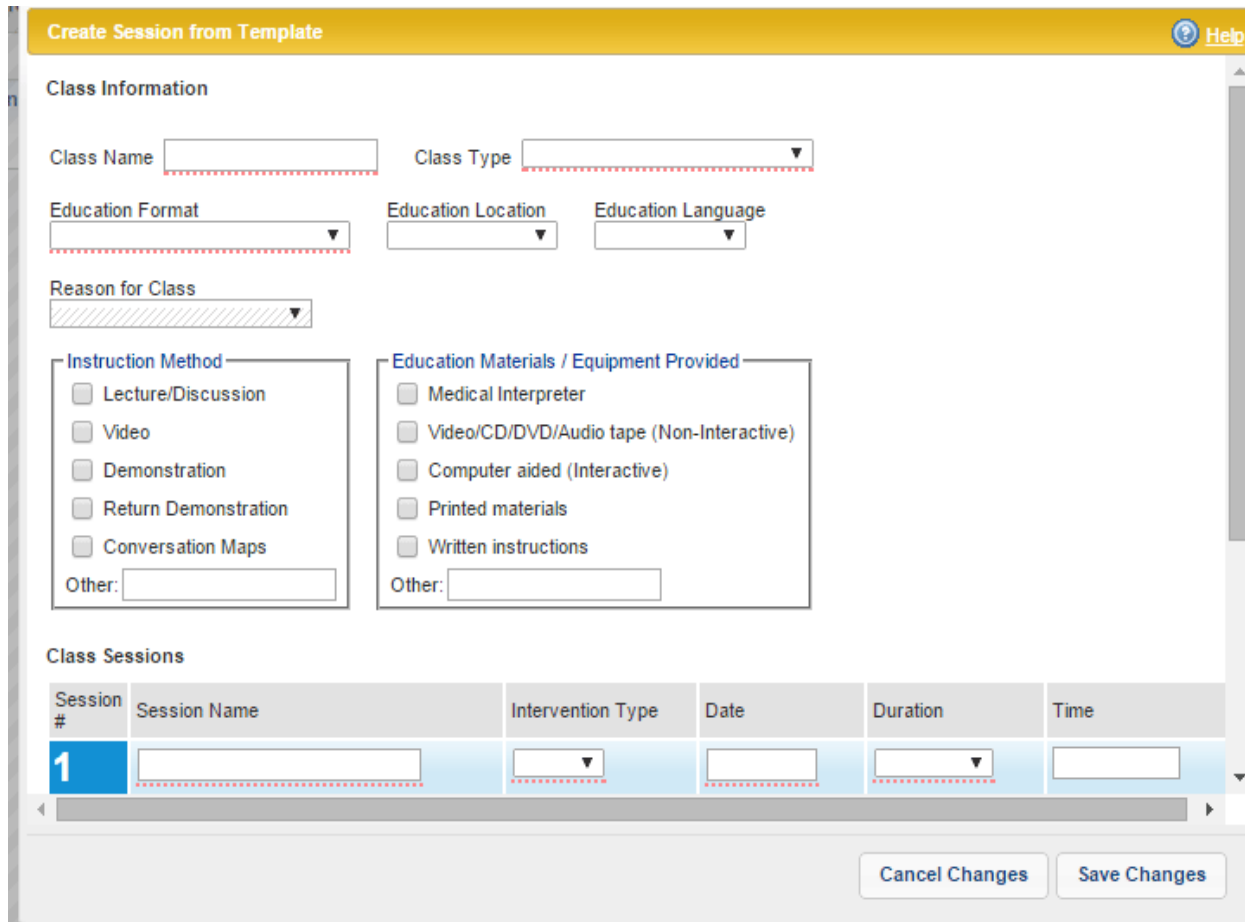
The screenshot displays the American Diabetes Association CHRONICLE DIABETES web application. The top navigation bar includes the logo, the text "CHRONICLE DIABETES", and tabs for "Patients", "Education", and "Reports". The left sidebar contains a "Class List" section with buttons for "Create New 1:1 Session" and "Create New Group Class", and a "Class Templates" section with a "Select template:" dropdown menu. The dropdown menu is open, showing options: "Quarterly DSME Class" (selected), "Select template...", "5 Core Classes", "DSME Class", "Quarterly DSME Class", "Test Template", "Testing", and "Testing". The main content area shows a search bar and a table with one row for a "June Class". The table columns are "Format: Classroom / Group", "Sessions: 1", "Attendees: 4", "Start: Jun 1, 2014", "End: Jun 1, 2014", and a "Generate Letters" button.

Format	Sessions	Attendees	Start	End	Generate Letters
Classroom / Group	1	4	Jun 1, 2014	Jun 1, 2014	<a href="#">Generate Letters</a>

## Creating a new Class from a Class Template *Page 2 of 2*

This will open up the **Create Class from Template** window, with all of the information from the template already populated into the class. Here you can add any additional information, making sure that all required fields (with red underlines) are completed. Note that if your class template included one or more sessions, you will need to fill in the session date for each session.

When all the class information is correct, click *Save Changes*, which will create the class and automatically open the class to the *General Information* page. **Next you can follow the normal class creation process by updating the patient roster.**



**Create Session from Template**

**Class Information**

Class Name  Class Type

Education Format  Education Location  Education Language

Reason for Class

**Instruction Method**

- ☐ Lecture/Discussion
- ☐ Video
- ☐ Demonstration
- ☐ Return Demonstration
- ☐ Conversation Maps
- Other:

**Education Materials / Equipment Provided**

- ☐ Medical Interpreter
- ☐ Video/CD/DVD/Audio tape (Non-Interactive)
- ☐ Computer aided (Interactive)
- ☐ Printed materials
- ☐ Written instructions
- Other:

**Class Sessions**

Session #	Session Name	Intervention Type	Date	Duration	Time
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

[Cancel Changes](#) [Save Changes](#)

## Class Template Tips

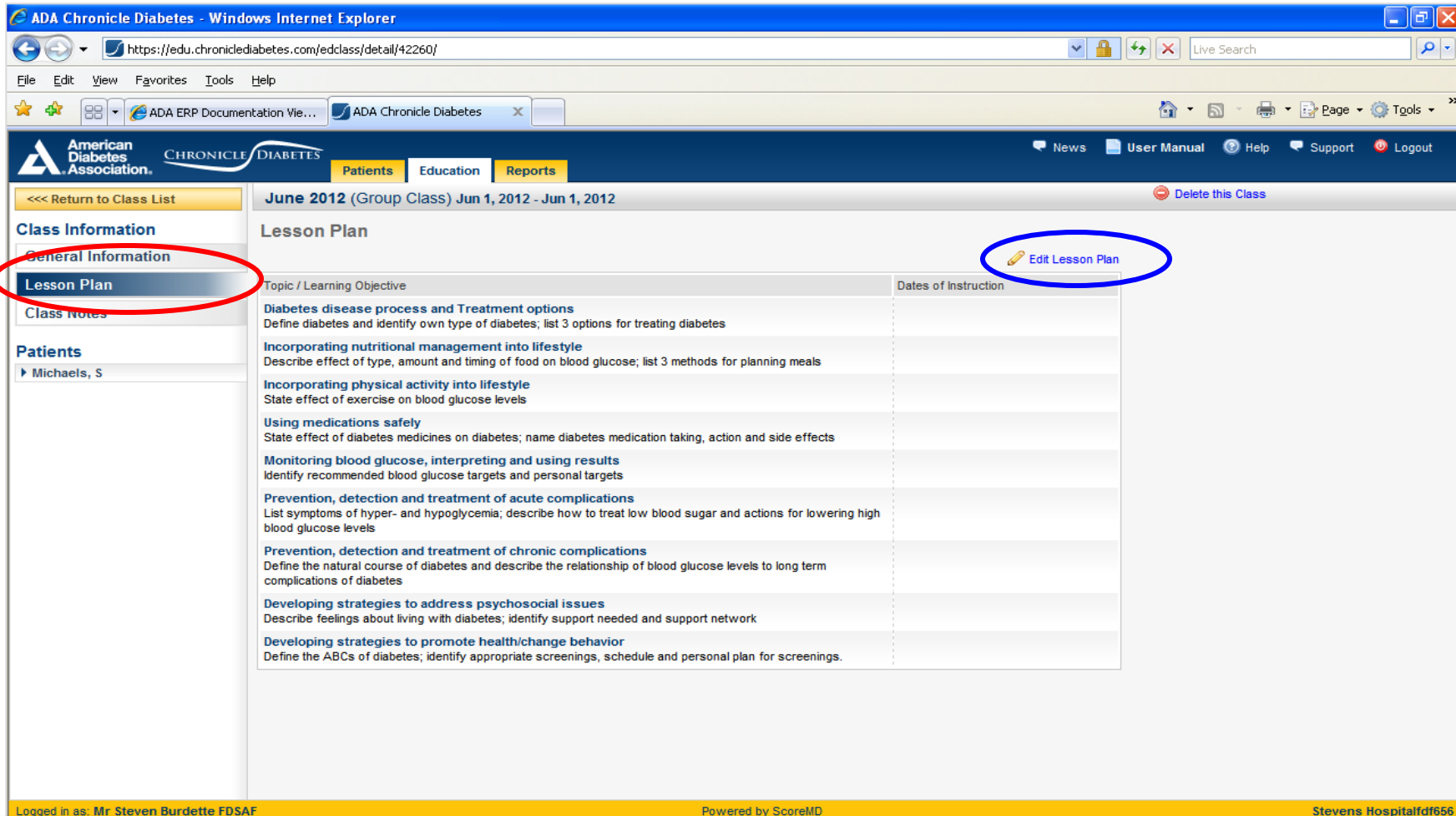
- It may be helpful to print and fill out the Class Template Worksheet below prior to creating a class template within Chronicle. **Download PDF Version**

	Class 1	Class 2	Class 3	Class 4	Class 5	Class 6
	1:1 or Group	1:1 or Group	1:1 or Group	1:1 or Group	1:1 or Group	1:1 or Group
Class Time	Hours	Hours	Hours	Hours	Hours	Hours
Diabetes Disease Process						
Nutrition Management						
Physical Activity? Being Active						
Taking Medications						
SMBG						
Preventing Acute Complications						
Preventing Chronic Complications						
Psycho social adjustment/Healthy Coping						
Promoting Health						

## Documenting Patient Education *Page 1 of 9*

### Topics Covered During Class Session

1. Click the **Lesson Plan** tab on the left site of the page to view or setup the class's educational lesson plan. Click the **Edit Lesson Plan** link.



ADA Chronicle Diabetes - Windows Internet Explorer

https://edu.chronicdiabetes.com/edclass/detail/42260/

File Edit View Favorites Tools Help

ADA ERP Documentation Vie... ADA Chronicle Diabetes

News User Manual Help Support Logout

June 2012 (Group Class) Jun 1, 2012 - Jun 1, 2012 Delete this Class

Class Information

General Information

**Lesson Plan**

Class Notes

Patients

Michaela, S

Lesson Plan

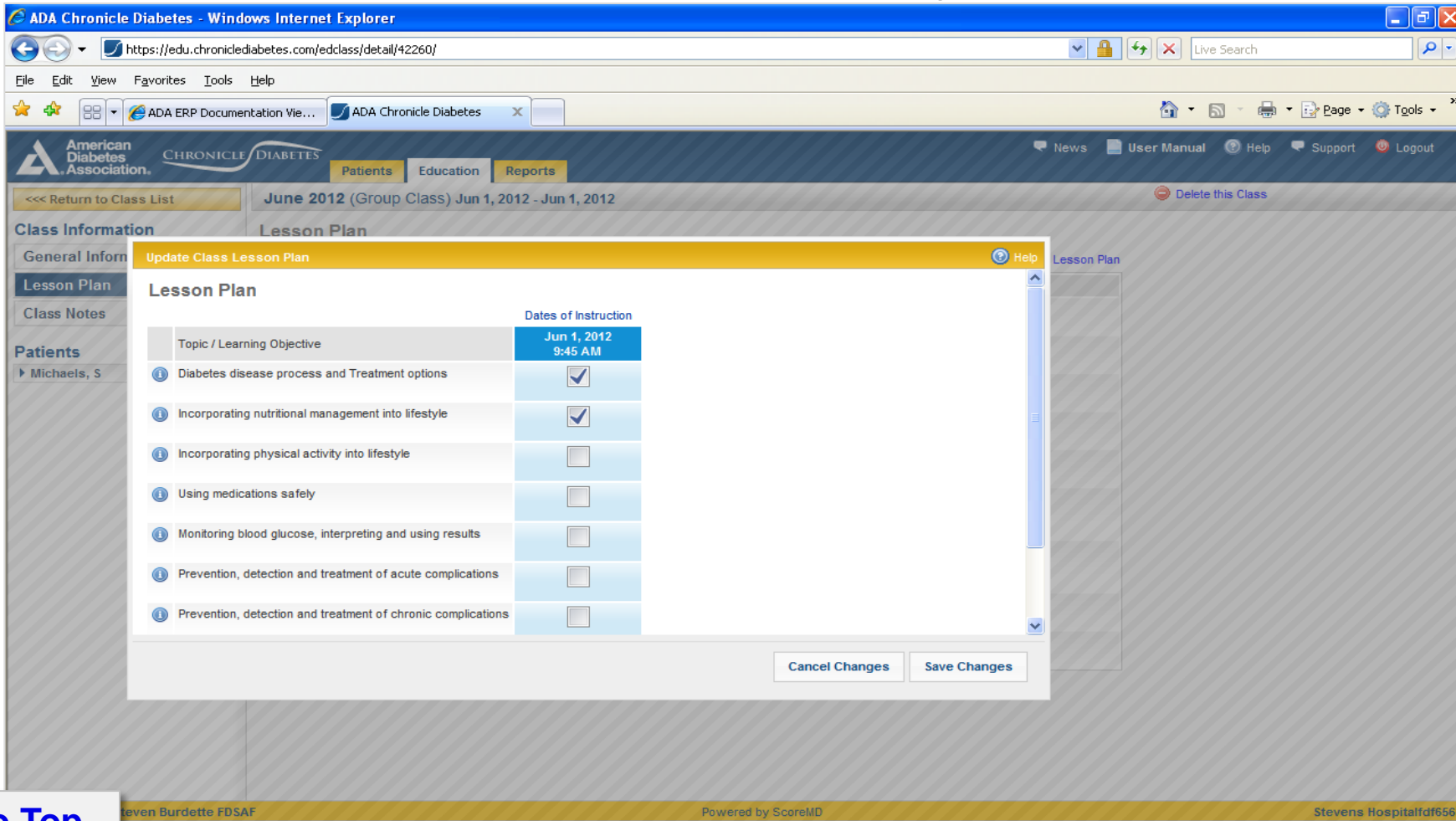
Topic / Learning Objective	Dates of Instruction
<b>Diabetes disease process and Treatment options</b> Define diabetes and identify own type of diabetes; list 3 options for treating diabetes	
<b>Incorporating nutritional management into lifestyle</b> Describe effect of type, amount and timing of food on blood glucose; list 3 methods for planning meals	
<b>Incorporating physical activity into lifestyle</b> State effect of exercise on blood glucose levels	
<b>Using medications safely</b> State effect of diabetes medicines on diabetes; name diabetes medication taking, action and side effects	
<b>Monitoring blood glucose, interpreting and using results</b> Identify recommended blood glucose targets and personal targets	
<b>Prevention, detection and treatment of acute complications</b> List symptoms of hyper- and hypoglycemia; describe how to treat low blood sugar and actions for lowering high blood glucose levels	
<b>Prevention, detection and treatment of chronic complications</b> Define the natural course of diabetes and describe the relationship of blood glucose levels to long term complications of diabetes	
<b>Developing strategies to address psychosocial issues</b> Describe feelings about living with diabetes; identify support needed and support network	
<b>Developing strategies to promote health/change behavior</b> Define the ABCs of diabetes; identify appropriate screenings, schedule and personal plan for screenings.	

Logged in as: Mr Steven Burdette FDSA Powered by ScoreMD Stevens Hospital/fdf656

## Documenting Patient Education *Page 2 of 9*

### Topics Covered During Class Session

2. For each educational topic that will be address during the class, click the check box to the left of the topic under the appropriate session column. You can check multiple boxes for a topic if it will be taught during multiple sessions. (Note, completing the Lesson Plan can be done after the education has occurred.) Click Save Changes.



The screenshot shows the ADA Chronicle Diabetes website in a Windows Internet Explorer browser. The URL is <https://edu.chronicdiabetes.com/edclass/detail/42260/>. The page displays the "Update Class Lesson Plan" modal window for the class "June 2012 (Group Class) Jun 1, 2012 - Jun 1, 2012".

**Class Information**

- Return to Class List
- June 2012 (Group Class) Jun 1, 2012 - Jun 1, 2012
- Delete this Class

**Lesson Plan**

Update Class Lesson Plan

General Information | Lesson Plan | Class Notes

**Patients**

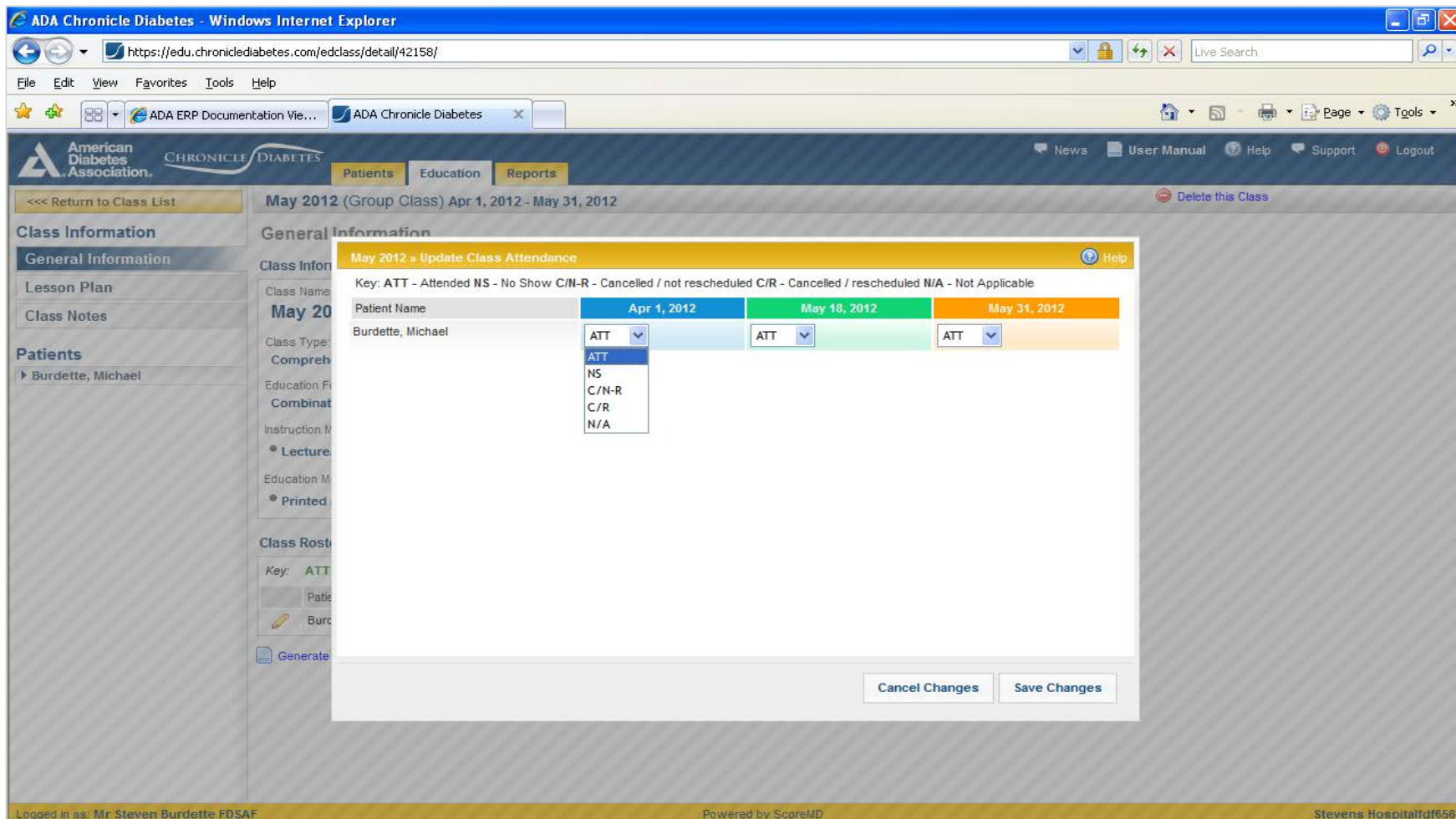
- Michaelis, S

Topic / Learning Objective	Dates of Instruction
Diabetes disease process and Treatment options	Jun 1, 2012 9:45 AM <input checked="" type="checkbox"/>
Incorporating nutritional management into lifestyle	<input checked="" type="checkbox"/>
Incorporating physical activity into lifestyle	<input type="checkbox"/>
Using medications safely	<input type="checkbox"/>
Monitoring blood glucose, interpreting and using results	<input type="checkbox"/>
Prevention, detection and treatment of acute complications	<input type="checkbox"/>
Prevention, detection and treatment of chronic complications	<input type="checkbox"/>

Cancel Changes Save Changes

## Documenting Patient Education *Page 3 of 9*

To update the **attendance**, within the *General Information* section of the class, click the Update Attendance link to bring up the Update Class Attendance window. To change a patient's attendance status as a session, click the dropdown list under the respective class session and change the appropriate value. Repeat this until all patients attendance is correct, then click Save Changes.



The screenshot shows the ADA Chronicle Diabetes website interface. The main window displays the 'General Information' section for a class titled 'May 2012 (Group Class) Apr 1, 2012 - May 31, 2012'. A modal window titled 'May 2012 » Update Class Attendance' is open, showing a table for updating attendance for the patient 'Burdette, Michael'.

**Key:** ATT - Attended NS - No Show C/N-R - Cancelled / not rescheduled C/R - Cancelled / rescheduled N/A - Not Applicable

Patient Name	Apr 1, 2012	May 18, 2012	May 31, 2012
Burdette, Michael	ATT	ATT	ATT

The dropdown menu for the 'Apr 1, 2012' session is open, showing the following options: ATT, NS, C/N-R, C/R, and N/A.

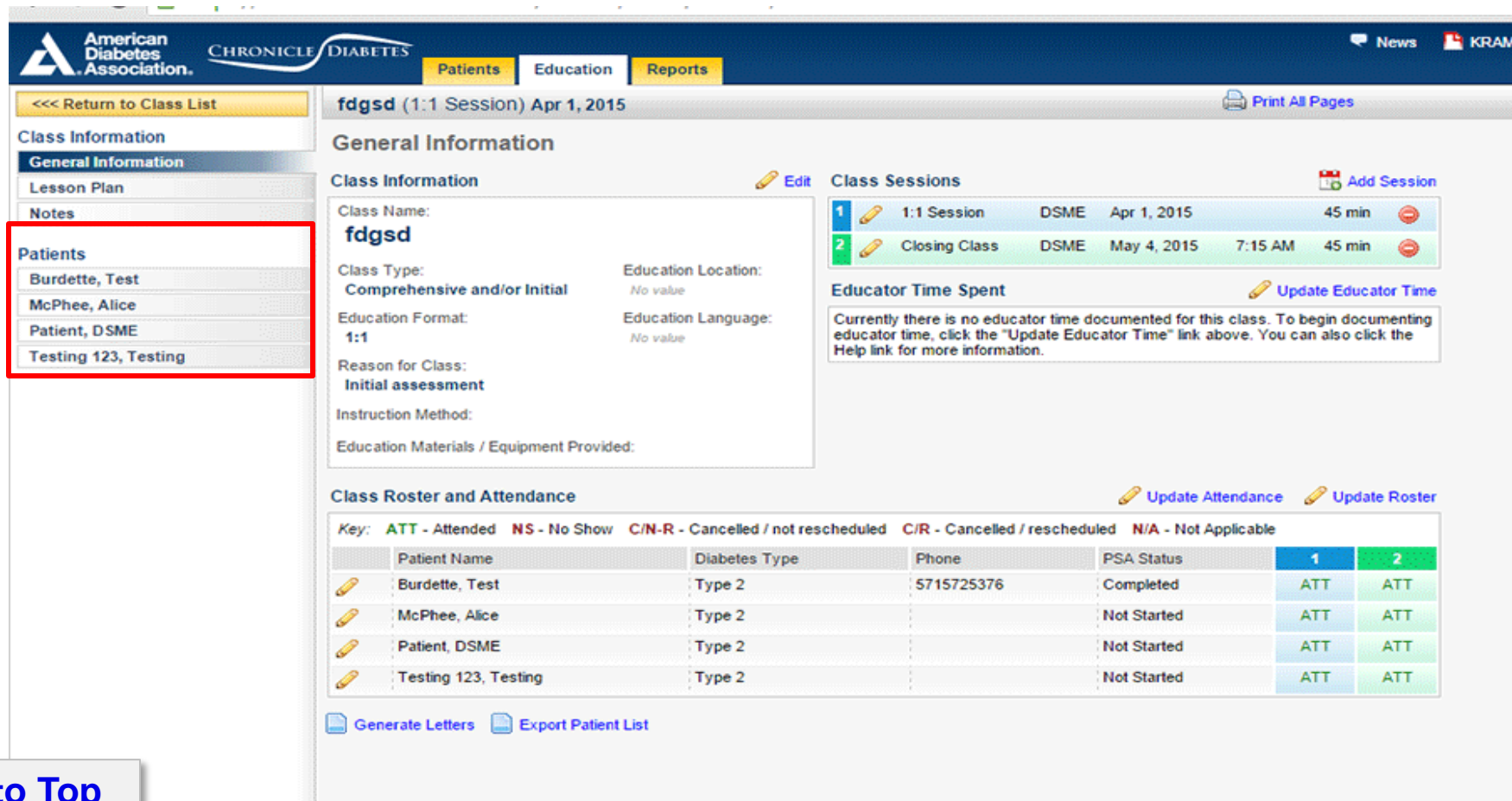
Buttons at the bottom of the modal window: **Cancel Changes** and **Save Changes**.

Footer information: Logged in as: Mr Steven Burdette FDSAF, Powered by ScoreMD, Stevens Hospitaldf656.



## Documenting Patient Education *Page 4 of 9*

**Individual Pre-Assessment and Post Education Evaluation** are done on a patient-by-patient basis. If you are currently in the class record, click on the **patients name** in the left menu to update patient education record (example below). If you are in a patient record, the education record is located in the *DSME & Follow-up* section. **Please continue to the next page for pre assessment & post education evaluation documentation.**



The screenshot displays the 'American Diabetes Association CHRONICLE DIABETES' interface. The left sidebar shows a menu with 'Patients' highlighted. The main content area shows details for a class named 'fdgsd' (1:1 Session) on April 1, 2015. The 'General Information' section includes class name, type, format, location, language, reason for class, and instruction method. The 'Class Sessions' table lists two sessions: a 1:1 Session and a Closing Class. The 'Educator Time Spent' section indicates no time is currently documented. The 'Class Roster and Attendance' table lists four patients: Burdette, Test; McPhee, Alice; Patient, DSME; and Testing 123, Testing. The bottom of the page has links for 'Generate Letters' and 'Export Patient List'.

**Left Menu:**

- <<< Return to Class List
- Class Information
  - General Information
  - Lesson Plan
  - Notes
  - Patients**
    - Burdette, Test
    - McPhee, Alice
    - Patient, DSME
    - Testing 123, Testing

**Class Information:** fdgsd (1:1 Session) Apr 1, 2015

**General Information:**

- Class Name: fdgsd
- Class Type: Comprehensive and/or Initial
- Education Location: No value
- Education Format: 1:1
- Education Language: No value
- Reason for Class: Initial assessment
- Instruction Method:
- Education Materials / Equipment Provided:

**Class Sessions:**

Session	Type	Location	Date	Time	Duration
1	1:1 Session	DSME	Apr 1, 2015		45 min
2	Closing Class	DSME	May 4, 2015	7:15 AM	45 min

**Educator Time Spent:** Currently there is no educator time documented for this class. To begin documenting educator time, click the "Update Educator Time" link above. You can also click the Help link for more information.

**Class Roster and Attendance:**

Key: ATT - Attended NS - No Show C/N-R - Cancelled / not rescheduled C/R - Cancelled / rescheduled N/A - Not Applicable

Patient Name	Diabetes Type	Phone	PSA Status	1	2
Burdette, Test	Type 2	5715725376	Completed	ATT	ATT
McPhee, Alice	Type 2		Not Started	ATT	ATT
Patient, DSME	Type 2		Not Started	ATT	ATT
Testing 123, Testing	Type 2		Not Started	ATT	ATT

[Generate Letters](#) [Export Patient List](#)

## Documenting Patient Education *Page 5 of 9*

The **DSME & Follow Up Section** shows all of the educational information for this patient. You will never need to leave this page to document this patient's educational assessment. **Note** that creating new classes (and class sessions), defining the lesson plan, and managing the roster and attendance are still done under the main top yellow *Education* tab.

### DSME & Follow-Up

#### Education Summary

2012 Mar Mon AM (Group Class) 

Location: ABC DSME Center

1	Mar 5, 2012	Intro	Attended
2	Mar 12, 2012	Main info	Attended
3	Mar 19, 2012	Conclusion	Attended

Addelson, Margaret - Initial assessment (1:1 Session) 





Location: ABC DSME Center

1	Mar 1, 2012	1:1 Session	Attended
---	-------------	-------------	----------

#### Follow-Up Summary

F/U Date	Method	Clinician	
 Jun 13, 2012	Phone	Ellen Educator	
 Aug 1, 2012	Phone	Ellen Educator	

### Patient Education Record

Key:	1 - Needs instruction	2 - Needs review	3 - Comprehends key points	4 - Demonstrates competency	N/A - Not applicable
Topic / Learning Objective	 Pre Assess.	 Post Eval.	 F/U (6/13/12)	 F/U (8/1/12)	
Disease Process	1	3	4	3	
Nutritional Management	2	4	3	4	
Physical Activity/Being Active	2	4	4	3	
Taking medications	1	4	4	2	
Monitoring	1	4	4	3	
Acute complications/Problem Solving	1	4	3	3	
Psychosocial Adjustment/healthy Coping	1	4	3	3	
Promote health/change behavior	1	4	4	2	

### Education Plan

#### Current Education Plan

Documented during: 2012 Mar Mon AM (3/5/12 - 3/19/12)  

Attended 7 hr comprehensive DM class. Has appt for initial 1 hr time with RD and RN. Will continue to FU with 30 min appt - q 3 months.

#### Previous Education Plans

### DSMS Plan

#### Current DSMS Plan

Documented during: F/U (8/1/12)  

Ongoing contact with PCP regarding insulin adjustments. Mayo clinic and ADA materials for the blind. Pt has already ordered materials.

#### Previous DSMS Plans

### Identified Barriers to learning/adherence to self management plan

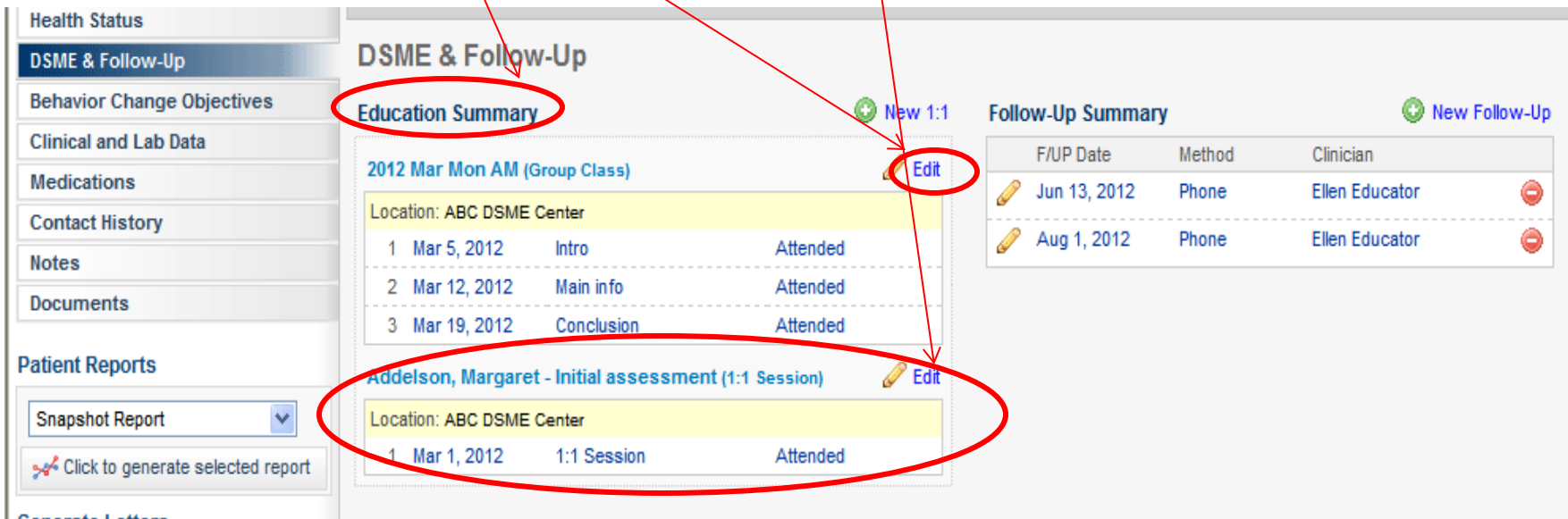
#### Current Entry

Documented during: Initial assessment (3/1/12)  

Has no insurance. Lives in a rural community with no gym

**Documenting Patient Education Page 6 of 9**

The **Education Summary** box lists all of the classes that this patient is on the *Roster* for. Clicking the **Edit** pencil next to a class will open that class's record (under the main top yellow *Education* tab) where you can make changes to the class's information (e.g. edit general information, add sessions, update roster and attendance, complete lesson plan, etc.). Note that every time you meet with a patient (e.g. for an **initial assessment**, a group class, or for additional education), that meeting is considered a class and should be added to the patient's record as a class (not a follow-up).



**Health Status**

- DSME & Follow-Up**
- Behavior Change Objectives
- Clinical and Lab Data
- Medications
- Contact History
- Notes
- Documents

**Patient Reports**

Snapshot Report ▼

Click to generate selected report

**DSME & Follow-Up**

**Education Summary** New 1:1

2012 Mar Mon AM (Group Class)

Location: ABC DSME Center





1	Mar 5, 2012	Intro	Attended
2	Mar 12, 2012	Main info	Attended
3	Mar 19, 2012	Conclusion	Attended

**Addelson, Margaret - Initial assessment (1:1 Session)** Edit

Location: ABC DSME Center

1	Mar 1, 2012	1:1 Session	Attended
---	-------------	-------------	----------

**Follow-Up Summary** New Follow-Up


F/UP Date	Method	Clinician
 Jun 13, 2012	Phone	Ellen Educator 
 Aug 1, 2012	Phone	Ellen Educator 


## Documenting Patient Education *Page 7 of 9*

The top right **Follow-Up Summary** box lists all of the follow-ups that have occurred with this patient. A patient can have any number of follow-ups. At each follow-up you can document an educational reassessment and make updates to the education plan, barriers to learning, and the DSMS plan. Note that follow-ups are not used when you meet with a patient to provide education. Follow-ups are intended to allow you to document when you follow-up with a patient to reassess their progress (e.g. three to six months after education). You can add a new follow-up by clicking the *New Follow-up* link and filling out the reassessment information.

### DSME & Follow-Up


#### Education Summary

 [New 1:1](#)

2012 Mar Mon AM (Group Class)  [Edit](#)

Location: ABC DSME Center


1	Mar 5, 2012	Intro	Attended
2	Mar 12, 2012	Main info	Attended
3	Mar 19, 2012	Conclusion	Attended





Addelson, Margaret - Initial assessment (1:1 Session)  [Edit](#)

Location: ABC DSME Center

1	Mar 1, 2012	1:1 Session	Attended
---	-------------	-------------	----------

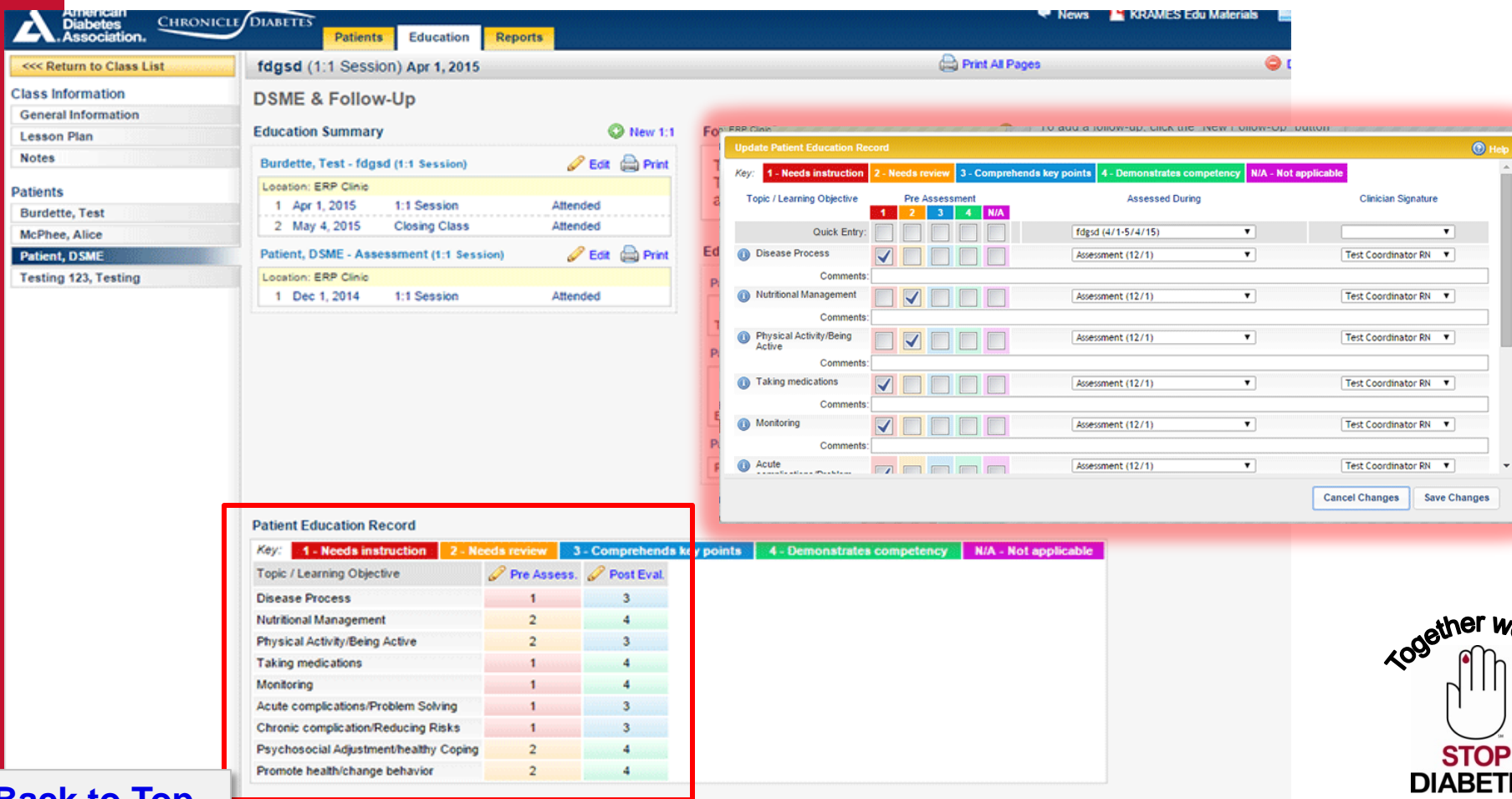
#### Follow-Up Summary

 [New Follow-Up](#)

F/U Date	Method	Clinician	
 Jun 13, 2012	Phone	Elen Educator	
 Aug 1, 2012	Phone	Elen Educator	

### Documenting Patient Education Page 8 of 9

Within the **education record** you are presented with a window which displays each of the nine topics and has two colored tables for *Pre Assessment* and a *Post Evaluation* scoring. For each of the nine areas that were taught, you can check a box in the *Pre Assessment* and *Post Evaluation* columns to indicate this patient's level before and after education.



**Patient Education Record**

Topic / Learning Objective	Pre Assess.	Post Eval.
Disease Process	1	3
Nutritional Management	2	4
Physical Activity/Being Active	2	3
Taking medications	1	4
Monitoring	1	4
Acute complications/Problem Solving	1	3
Chronic complication/Reducing Risks	1	3
Psychosocial Adjustment/healthy Coping	2	4
Promote health/change behavior	2	4

**Update Patient Education Record**

Key: 1 - Needs instruction 2 - Needs review 3 - Comprehends key points 4 - Demonstrates competency N/A - Not applicable

Topic / Learning Objective	Pre Assessment	Assessed During	Clinician Signature
Quick Entry:	1 2 3 4 N/A	fdgsd (4/1-5/4/15)	
1 Disease Process	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Assessment (12/1)	Test Coordinator RN
1 Nutritional Management	<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Assessment (12/1)	Test Coordinator RN
1 Physical Activity/Being Active	<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Assessment (12/1)	Test Coordinator RN
1 Taking medications	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Assessment (12/1)	Test Coordinator RN
1 Monitoring	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Assessment (12/1)	Test Coordinator RN
1 Acute complications/Problem Solving	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Assessment (12/1)	Test Coordinator RN

Cancel Changes Save Changes



## Documenting Patient Education *Page 9 of 9*

The **Education Plan**, **DSMS Plan** and **Barriers to Learning** are located under the Patient Education Record. Click on the New or Edit option next to the appropriate section to enter or update the information.

[<<< Return to Class List](#)
fdgsd (1:1 Session) Apr 1, 2015
[Print All Pages](#)

**Class Information**  
General Information  
Lesson Plan  
Notes

**Patients**  
Burdette, Test  
McPhee, Alice  
**Patient, DSME**  
Testing 123, Testing

Date Completed: No value  
Education Status Note: No value  
Patient follow up success [Edit](#)  
Patient Lost to Follow-Up: No

**Patient Education Record**  
Key: 1 - Needs instruction 2 - Needs review 3 - Comprehends key points 4 - Demonstrates competency N/A - Not applicable  

Topic / Learning Objective	Pre Assess	Post Eval
Disease Process	1	3
Nutritional Management	2	4
Physical Activity/Being Active	2	3
Taking medications	1	4
Monitoring	1	4
Acute complications/Problem Solving	1	3
Chronic complication/Reducing Risks	1	3
Psychosocial Adjustment/healthy Coping	2	4
Promote health/change behavior	2	4

**Education Plan** [New Education Plan](#)  
There have not been any Education Plans documented for this patient. To add a new Education Plan, click the New Education Plan link above.

**DSMS Plan** [New DSMS Plan](#)  

Current DSMS Plan  
Documented during: Assessment (12/1/14) [Edit DSMS Plan](#) [Delete DSMS Plan](#)

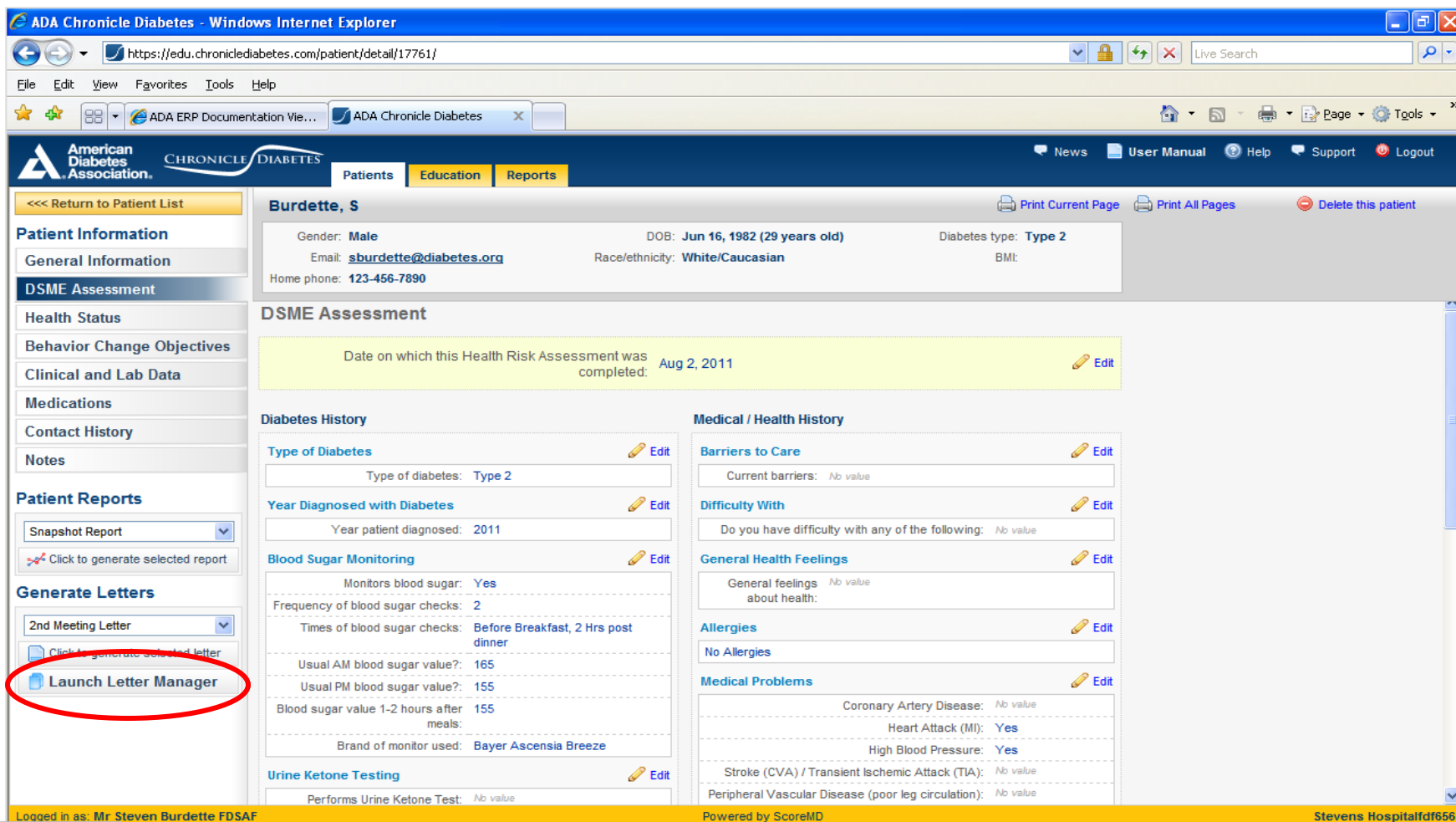
☐ Diabetes Forecast- 800-342-2383- www.diabetesforecast.org  
☐ Diabetes Self-Management- 855-367-4813- www.diabetesselfmanagement.com

**Identified Barriers to learning/adherence to self management plan** [New Entry](#)  
There have not been any identified Barriers to learning/adherence to self management plan documented for this patient. To add a new Entry, click the New Entry link above.



## Module 3: Creating and Editing Letters with the Letter Manager *Page 1 of 5*

1. From any Letter Generation Wizard window, or from the **Launch Letter Manager** tab at the bottom left of a patient's record, you can use the Letter Manager to create and edit your letters in the system.



The screenshot displays the ADA Chronicle Diabetes patient record for Mr. Steven Burdette. The interface includes a navigation menu on the left with sections like Patient Information, DSME Assessment, Patient Reports, and Generate Letters. The 'Launch Letter Manager' button is highlighted with a red circle. The main content area shows patient details, DSME Assessment, Diabetes History, and Medical/Health History.

**ADA Chronicle Diabetes - Windows Internet Explorer**  
https://edu.chronicdiabetes.com/patient/detail/17761/

**American Diabetes Association. CHRONICLE DIABETES**  
Patients Education Reports

**Burdette, S**  
Gender: Male DOB: Jun 16, 1982 (29 years old) Diabetes type: Type 2  
Email: sburdette@diabetes.org Race/ethnicity: White/Caucasian BMI:  
Home phone: 123-456-7890

**DSME Assessment**  
Date on which this Health Risk Assessment was completed: Aug 2, 2011

**Diabetes History**  
Type of Diabetes: Type 2  
Year Diagnosed with Diabetes: 2011  
Blood Sugar Monitoring: Monitors blood sugar: Yes, Frequency of blood sugar checks: 2, Times of blood sugar checks: Before Breakfast, 2 Hrs post dinner, Usual AM blood sugar value?: 165, Usual PM blood sugar value?: 155, Blood sugar value 1-2 hours after meals: 155, Brand of monitor used: Bayer Ascensia Breeze  
Urine Ketone Testing: Performs Urine Ketone Test: No value

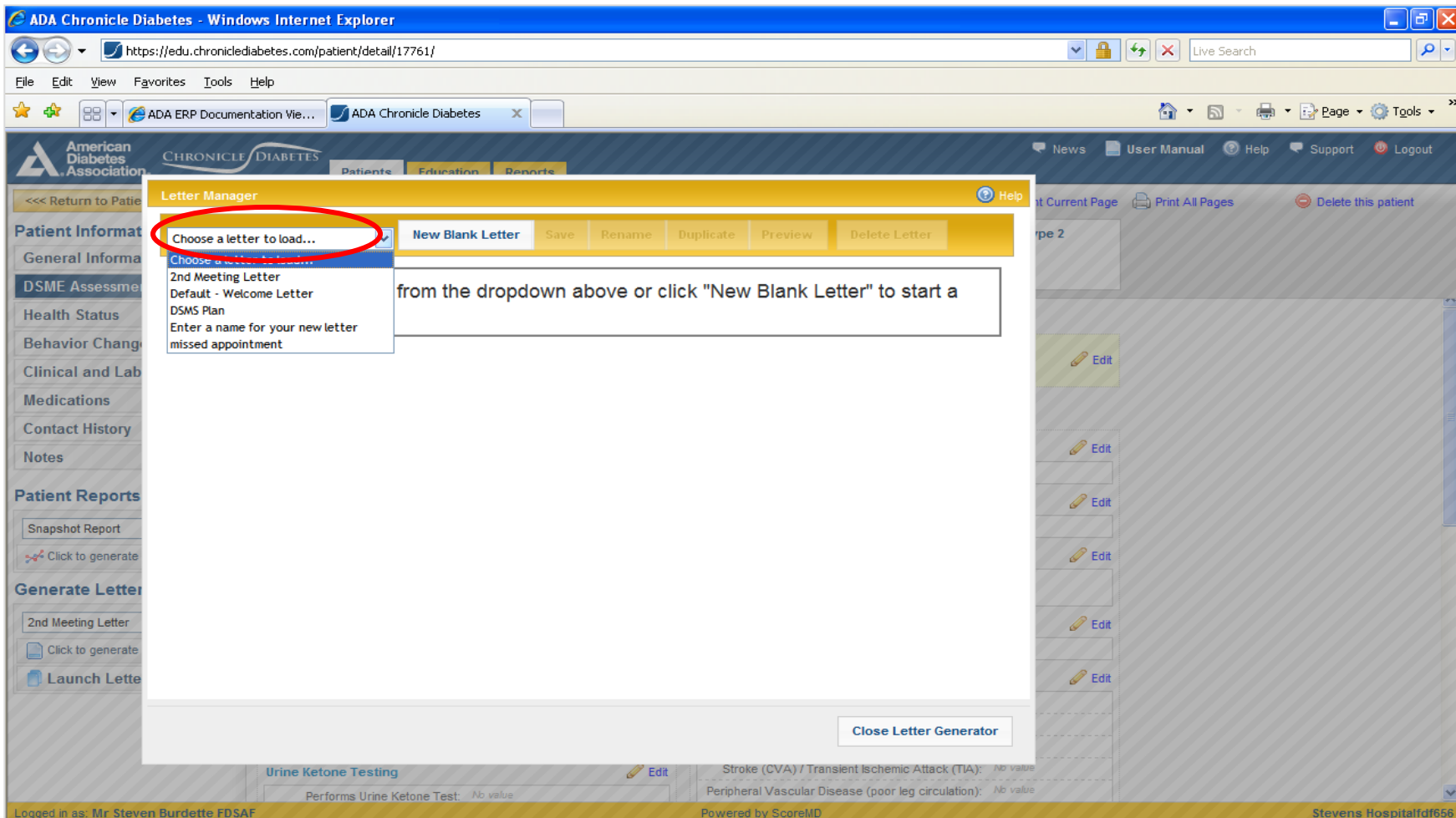
**Medical / Health History**  
Barriers to Care: Current barriers: No value  
Difficulty With: Do you have difficulty with any of the following: No value  
General Health Feelings: General feelings about health: No value  
Allergies: No Allergies  
Medical Problems: Coronary Artery Disease: No value, Heart Attack (MI): Yes, High Blood Pressure: Yes, Stroke (CVA) / Transient Ischemic Attack (TIA): No value, Peripheral Vascular Disease (poor leg circulation): No value

**Generate Letters**  
2nd Meeting Letter  
Click to generate selected letter  
**Launch Letter Manager**

Logged in as: Mr Steven Burdette FDSA  
Powered by ScoreMD  
Stevens Hospital/fdf656

## Creating and Editing Letters with the Letter Manager *Page 2 of 5*

2. To begin editing an existing letter, select the letter from the **Choose a letter to load** drop down list at the top of the wizard. That will load the letter template in the main text area. Alternatively, you can click New Blank Letter to start from scratch.



ADA Chronicle Diabetes - Windows Internet Explorer

https://edu.chronicdiabetes.com/patient/detail/17761/

File Edit View Favorites Tools Help

ADA ERP Documentation Vie... ADA Chronicle Diabetes

American Diabetes Association CHRONICLE DIABETES

<< Return to Patient Information

Patient Information

General Information

DSME Assessment

Health Status

Behavior Change

Clinical and Laboratory

Medications

Contact History

Notes

Patient Reports

Snapshot Report

Click to generate

Generate Letter

2nd Meeting Letter

Click to generate

Launch Letter

Letter Manager

Choose a letter to load...

Choose a letter to load...

2nd Meeting Letter

Default - Welcome Letter

DSMS Plan

Enter a name for your new letter missed appointment

New Blank Letter

Save

Rename

Duplicate

Preview

Delete Letter

from the dropdown above or click "New Blank Letter" to start a

Close Letter Generator

Urine Ketone Testing

Performs Urine Ketone Test: No value

Stroke (CVA) / Transient Ischemic Attack (TIA): No value

Peripheral Vascular Disease (poor leg circulation): No value

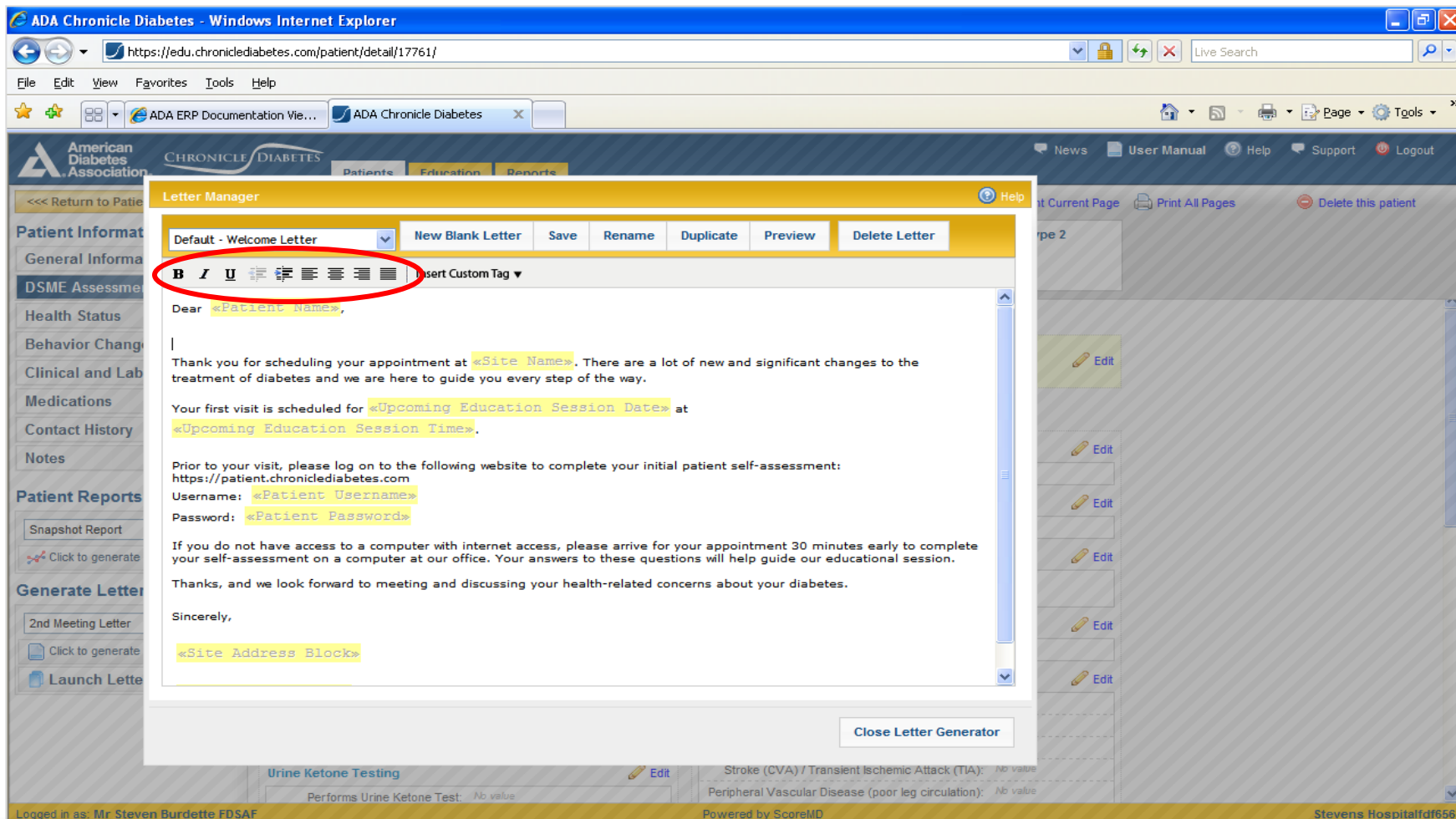
Logged in as: Mr Steven Burdette FDSAF

Powered by ScoreMD

Stevens Hospital/fdf556

## Creating and Editing Letters with the Letter Manager Page 3 of 5

3) Edit the text of the letter using normal text editing steps (type, delete, etc.). To format text, select a section of text and use the **formatting bar** directly above the main letter area to change the style, justification and formatting.



ADA Chronicle Diabetes - Windows Internet Explorer

https://edu.chronicdiabetes.com/patient/detail/17761/

File Edit View Favorites Tools Help

ADA ERP Documentation Vie... ADA Chronicle Diabetes

American Diabetes Association CHRONICLE DIABETES Patients Education Reports

<< Return to Patient Information

Patient Information General Information DSME Assessment Health Status Behavior Change Clinical and Laboratory Medications Contact History Notes

Patient Reports Snapshot Report Click to generate

Generate Letter 2nd Meeting Letter Click to generate Launch Letter

Letter Manager

Default - Welcome Letter New Blank Letter Save Rename Duplicate Preview Delete Letter

**B** *I* U [List Icon] [Numbered List Icon] [Indent Left Icon] [Indent Right Icon] [Justify Icon] Insert Custom Tag ▼

Dear «Patient Name»,

Thank you for scheduling your appointment at «Site Name». There are a lot of new and significant changes to the treatment of diabetes and we are here to guide you every step of the way.

Your first visit is scheduled for «Upcoming Education Session Date» at «Upcoming Education Session Time».

Prior to your visit, please log on to the following website to complete your initial patient self-assessment:  
https://patient.chronicdiabetes.com  
Username: «Patient Username»  
Password: «Patient Password»

If you do not have access to a computer with internet access, please arrive for your appointment 30 minutes early to complete your self-assessment on a computer at our office. Your answers to these questions will help guide our educational session.

Thanks, and we look forward to meeting and discussing your health-related concerns about your diabetes.

Sincerely,

«Site Address Block»

Close Letter Generator

Urine Ketone Testing Performs Urine Ketone Test: No value

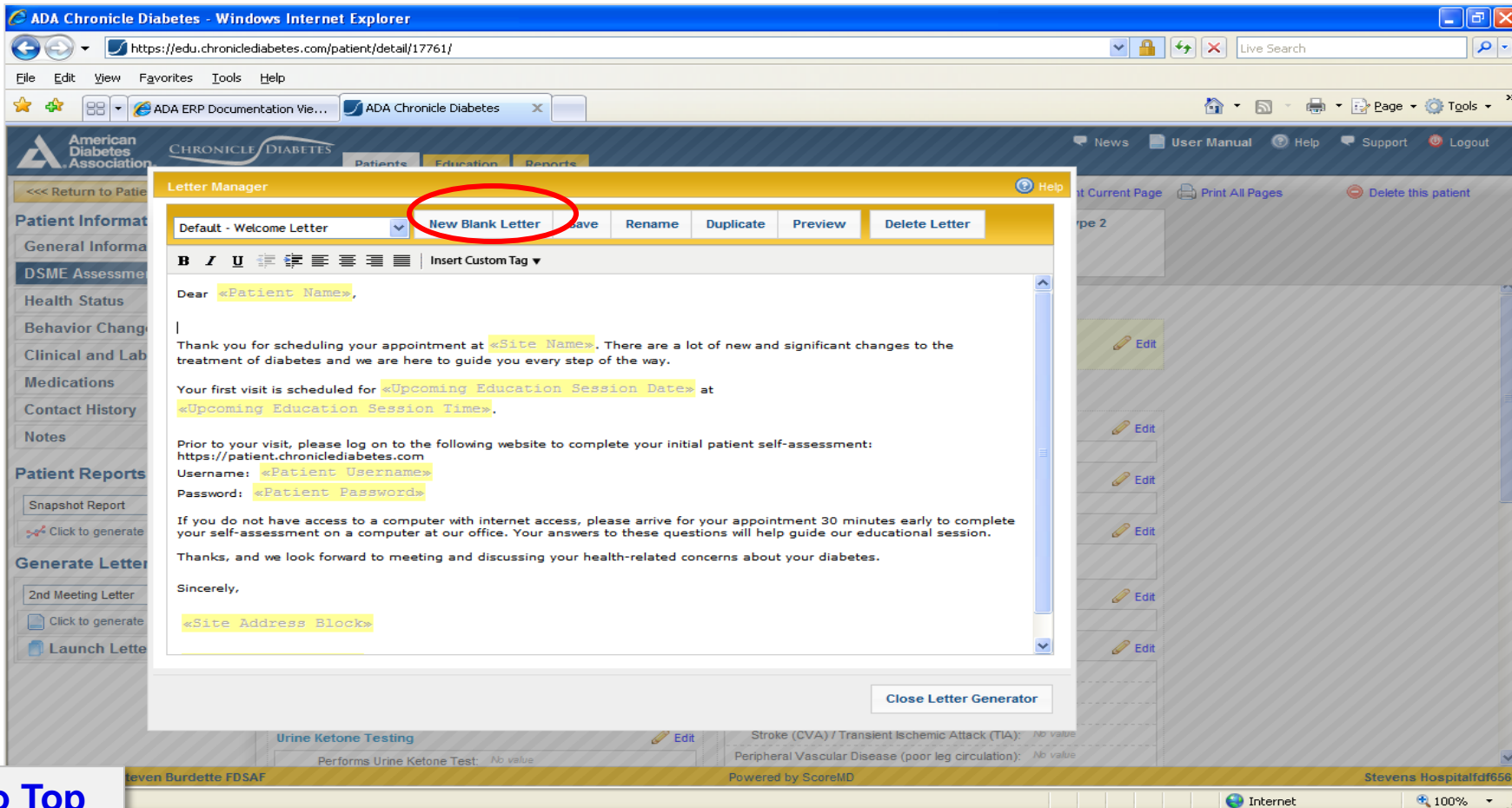
Stroke (CVA) / Transient Ischemic Attack (TIA): No value

Peripheral Vascular Disease (poor leg circulation): No value

Logged in as: Mr Steven Burdette FDSAF Powered by ScoreMD Stevens Hospital/fdf656

## Creating and Editing Letters with the Letter Manager *Page 4 of 5*

4) To insert a data field (e.g. current date, patient's name, etc.) that will be replaced when the letter template is merged with patient data, start by positioning the cursor where you would like the tag to go. Next click on the **Insert Custom Tag** menu and then select the tag you would like from the menu. This will insert a yellow tag into the letter, which will be replaced with the corresponding data when the actual letter is generated.



ADA Chronicle Diabetes - Windows Internet Explorer

https://edu.chronicdiabetes.com/patient/detail/17761/

File Edit View Favorites Tools Help

ADA ERP Documentation Vie... ADA Chronicle Diabetes

News User Manual Help Support Logout

Letter Manager

Default - Welcome Letter New Blank Letter Save Rename Duplicate Preview Delete Letter

B I U [List Icon] [Link Icon] [Unlink Icon] [Table Icon] Insert Custom Tag

Dear «Patient Name»,

Thank you for scheduling your appointment at «Site Name». There are a lot of new and significant changes to the treatment of diabetes and we are here to guide you every step of the way.

Your first visit is scheduled for «Upcoming Education Session Date» at «Upcoming Education Session Time».

Prior to your visit, please log on to the following website to complete your initial patient self-assessment:  
https://patient.chronicdiabetes.com  
Username: «Patient Username»  
Password: «Patient Password»

If you do not have access to a computer with internet access, please arrive for your appointment 30 minutes early to complete your self-assessment on a computer at our office. Your answers to these questions will help guide our educational session.

Thanks, and we look forward to meeting and discussing your health-related concerns about your diabetes.

Sincerely,

«Site Address Block»

Close Letter Generator

Urine Ketone Testing Edit

Stroke (CVA) / Transient Ischemic Attack (TIA): No value

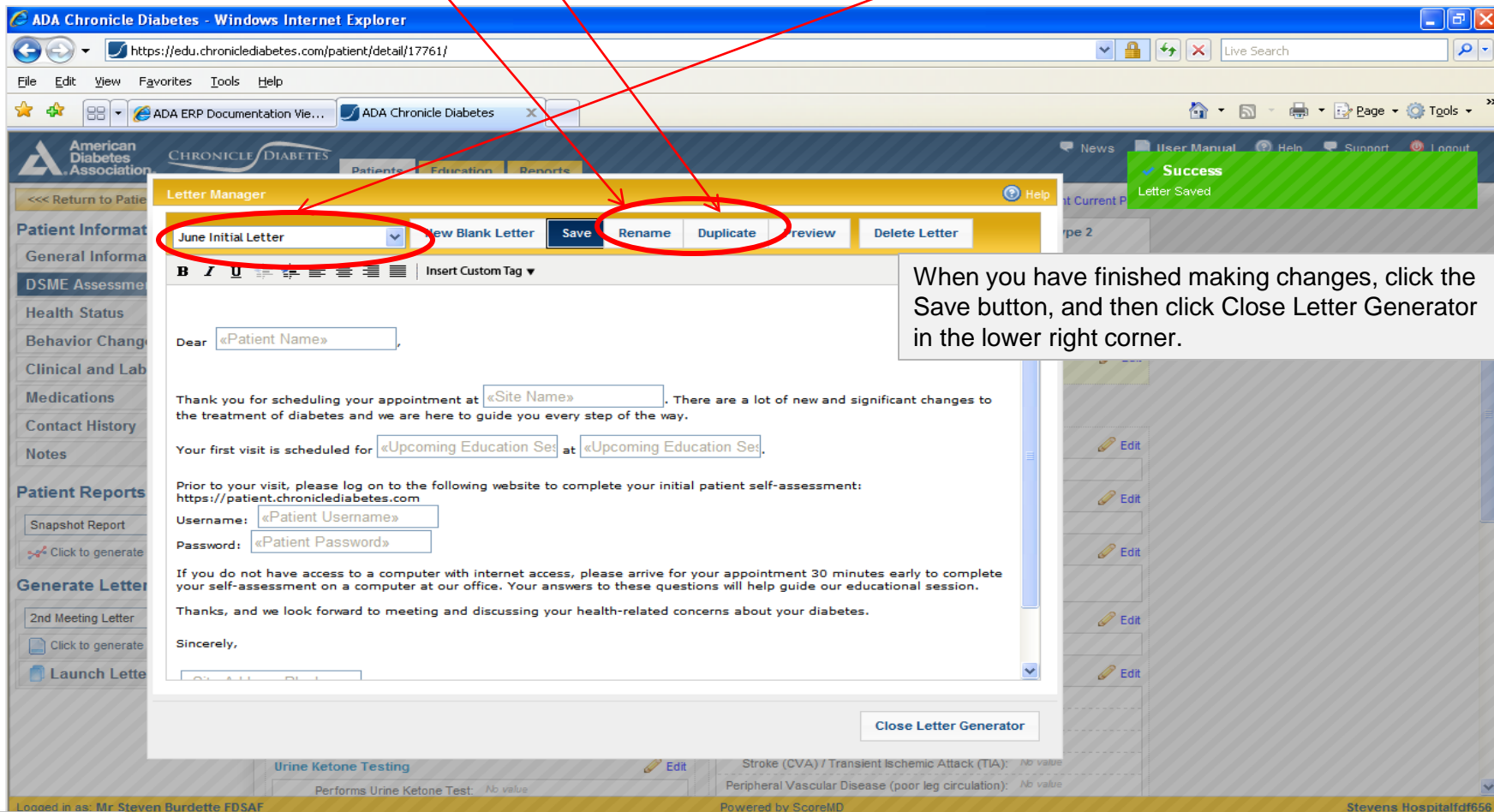
Peripheral Vascular Disease (poor leg circulation): No value

Seven Burdette FDSAF Powered by ScoreMD Stevens Hospitalfd656

Internet 100%

### Creating and Editing Letters with the Letter Manager *Page 5 of 5*

A letter can be renamed (e.g. change the name of the letter as it appears in the Select **Letter dropdown** menu) by clicking the **Rename** button. To create a new letter based on an existing letter, first select the existing letter and then click **Duplicate** and give the new letter a new name. Perform any edits to this new letter and save it when done. Clicking Preview will generate a downloadable version of the letter in the Microsoft Word format.



ADA Chronicle Diabetes - Windows Internet Explorer

https://edu.chronicdiabetes.com/patient/detail/17761/

File Edit View Favorites Tools Help

ADA ERP Documentation Vie... ADA Chronicle Diabetes

American Diabetes Association CHRONICLE DIABETES Patients Education Reports

<< Return to Patient Letter Manager Help

Patient Information General Information DSME Assessment Health Status Behavior Change Clinical and Lab Medications Contact History Notes Patient Reports Snapshot Report Click to generate Generate Letter 2nd Meeting Letter Click to generate Launch Letter

June Initial Letter New Blank Letter Save Rename Duplicate review Delete Letter

Success Letter Saved

When you have finished making changes, click the Save button, and then click Close Letter Generator in the lower right corner.

Dear «Patient Name»,

Thank you for scheduling your appointment at «Site Name». There are a lot of new and significant changes to the treatment of diabetes and we are here to guide you every step of the way.

Your first visit is scheduled for «Upcoming Education Session» at «Upcoming Education Session».

Prior to your visit, please log on to the following website to complete your initial patient self-assessment:  
https://patient.chronicdiabetes.com

Username: «Patient Username»  
Password: «Patient Password»

If you do not have access to a computer with internet access, please arrive for your appointment 30 minutes early to complete your self-assessment on a computer at our office. Your answers to these questions will help guide our educational session.

Thanks, and we look forward to meeting and discussing your health-related concerns about your diabetes.

Sincerely,

Close Letter Generator

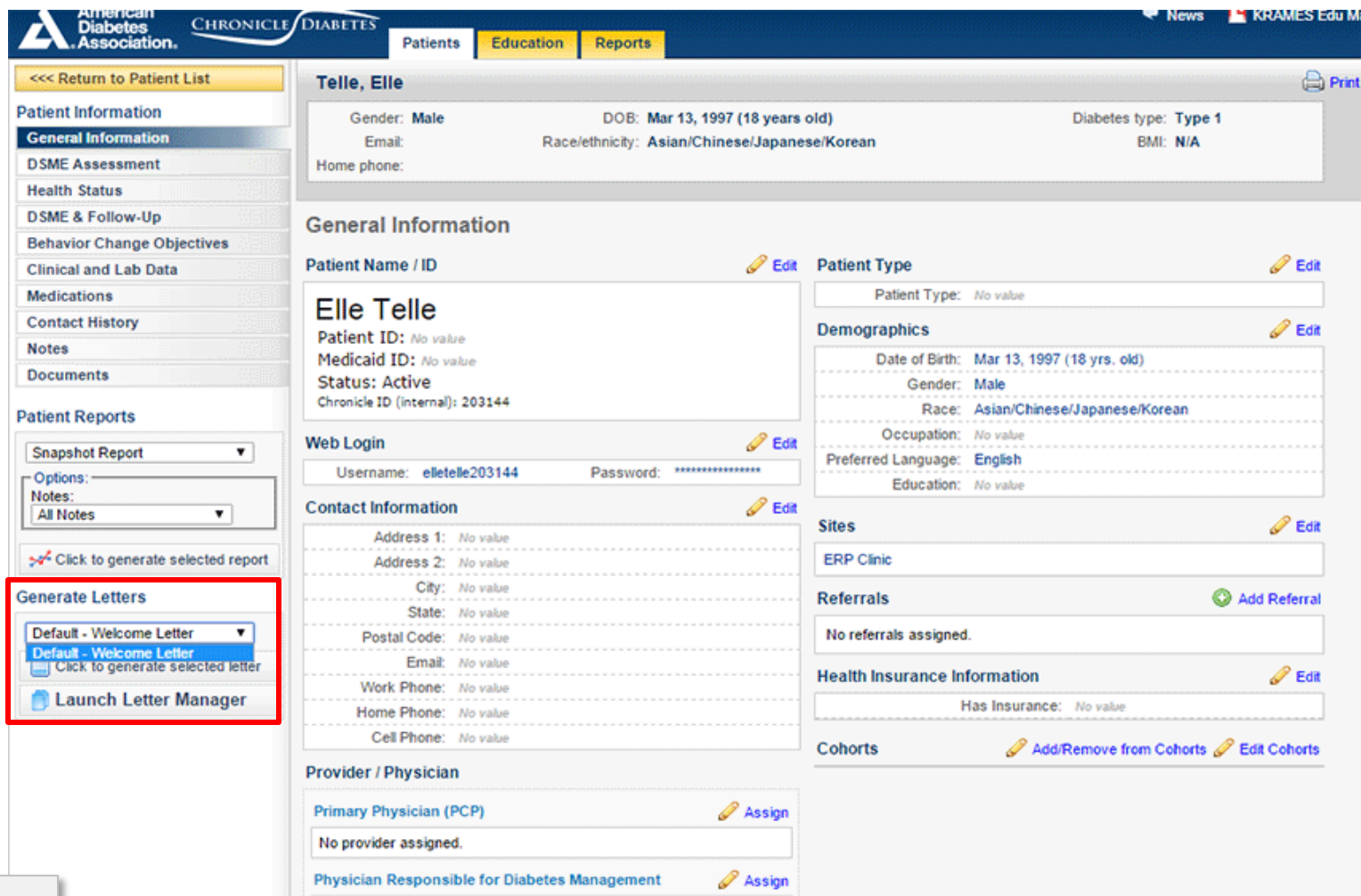
Urine Ketone Testing Performs Urine Ketone Test: No value Stroke (CVA) / Transient Ischemic Attack (TIA): No value Peripheral Vascular Disease (poor leg circulation): No value

Logged in as: Mr Steven Burdette FDSAF Powered by ScoreMD Stevens Hospitaldf656

## Generating Individual Patient Letters *Page 1 of 2*

Once you are in the patient record:

- 1) Choose the letter you would like to send within the Generate Letters dropdown menu
- 2) Click the *Click to generate selected letter* button on the lower left menu.



The screenshot shows the patient record for 'Telle, Elle'. The interface includes a sidebar with navigation options like 'Patient Information', 'Patient Reports', and 'Generate Letters'. The 'Generate Letters' section is highlighted with a red box, showing a dropdown menu with 'Default - Welcome Letter' selected and a button labeled 'Click to generate selected letter'. The main content area displays patient details such as Gender (Male), DOB (Mar 13, 1997), Diabetes type (Type 1), and BMI (N/A). It also includes sections for General Information, Web Login, Contact Information, and Provider/Physician.

**CHRONICLE DIABETES**

Patients Education Reports

<<< Return to Patient List

**Telle, Elle** Print

Gender: Male DOB: Mar 13, 1997 (18 years old) Diabetes type: Type 1  
Email: Race/ethnicity: Asian/Chinese/Japanese/Korean BMI: N/A  
Home phone:

**General Information**

Patient Name / ID Edit  
**Elle Telle**  
Patient ID: No value  
Medicaid ID: No value  
Status: Active  
Chronicle ID (internal): 203144

Web Login Edit  
Username: elletelle203144 Password: \*\*\*\*\*

Contact Information Edit  
Address 1: No value  
Address 2: No value  
City: No value  
State: No value  
Postal Code: No value  
Email: No value  
Work Phone: No value  
Home Phone: No value  
Cell Phone: No value

Provider / Physician  
Primary Physician (PCP) Assign  
No provider assigned.  
Physician Responsible for Diabetes Management Assign

Patient Type Edit  
Patient Type: No value

Demographics Edit  
Date of Birth: Mar 13, 1997 (18 yrs. old)  
Gender: Male  
Race: Asian/Chinese/Japanese/Korean  
Occupation: No value  
Preferred Language: English  
Education: No value

Sites Edit  
ERP Clinic

Referrals Add Referral  
No referrals assigned.

Health Insurance Information Edit  
Has insurance: No value

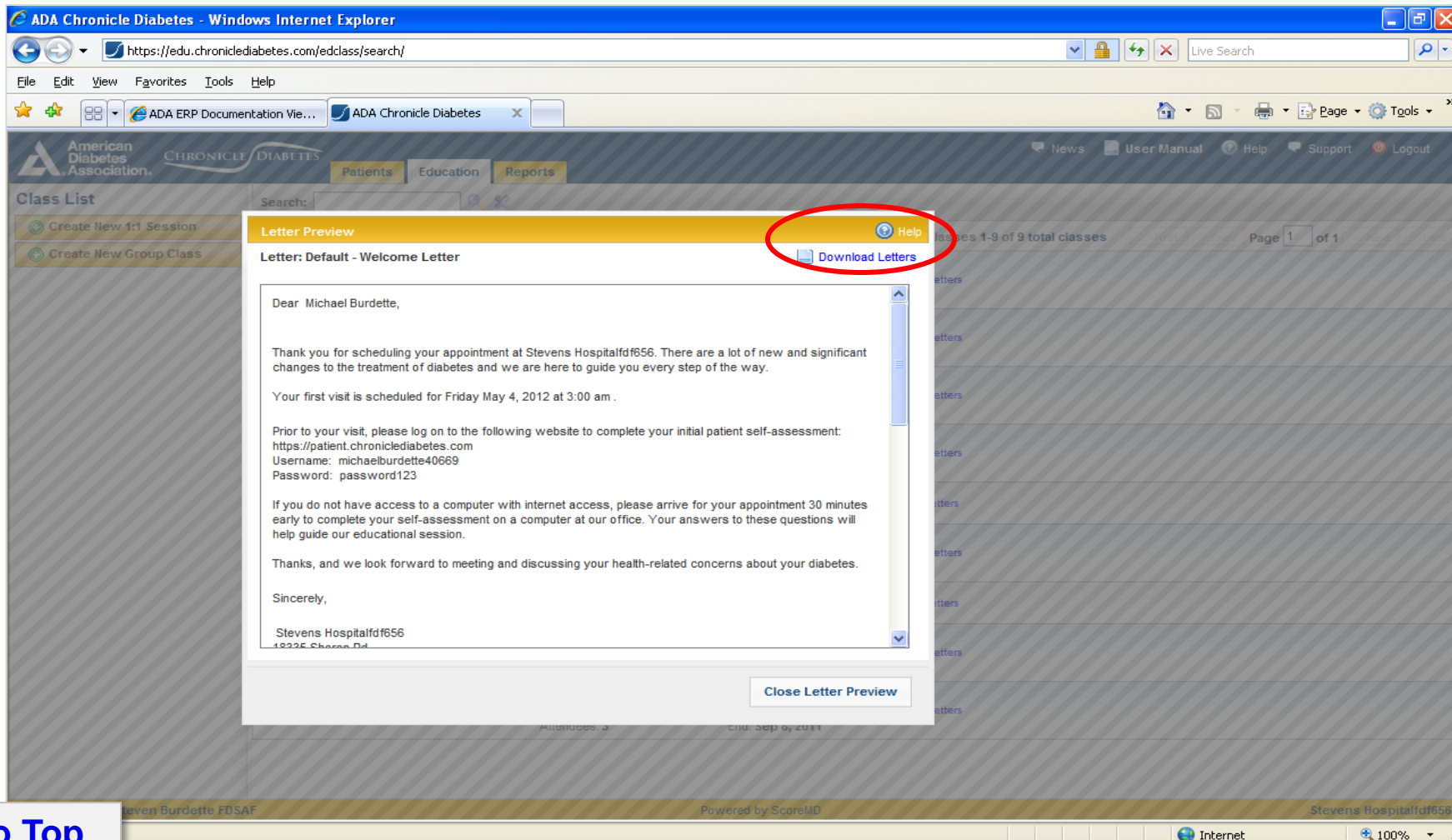
Cohorts Add/Remove from Cohorts Edit Cohorts

**Generate Letters**  
Default - Welcome Letter  
Default - Welcome Letter  
Click to generate selected letter  
Launch Letter Manager



### Generating Individual Patient Letters *Page 2 of 2*

You will see a preview of the letter(s) that will be created. If this looks correct, click **Download Letters**, which will prompt you to download the resulting Microsoft Word file to your computer. Once the letters file is on your computer you can open it in Microsoft Word, edit it as necessary, and print the letter to send to the patients.



The screenshot shows a web browser window titled "ADA Chronicle Diabetes - Windows Internet Explorer". The address bar displays "https://edu.chronicdiabetes.com/edclass/search/". The website header includes the American Diabetes Association logo and navigation tabs for "Patients", "Education", and "Reports". A "Class List" sidebar on the left offers options to "Create New 1:1 Session" and "Create New Group Class". The main content area displays a "Letter Preview" for a "Default - Welcome Letter". The letter text is as follows:

Dear Michael Burdette,

Thank you for scheduling your appointment at Stevens Hospitaldf656. There are a lot of new and significant changes to the treatment of diabetes and we are here to guide you every step of the way.

Your first visit is scheduled for Friday May 4, 2012 at 3:00 am .

Prior to your visit, please log on to the following website to complete your initial patient self-assessment:  
https://patient.chronicdiabetes.com  
Username: michaelburdette40669  
Password: password123

If you do not have access to a computer with internet access, please arrive for your appointment 30 minutes early to complete your self-assessment on a computer at our office. Your answers to these questions will help guide our educational session.

Thanks, and we look forward to meeting and discussing your health-related concerns about your diabetes.

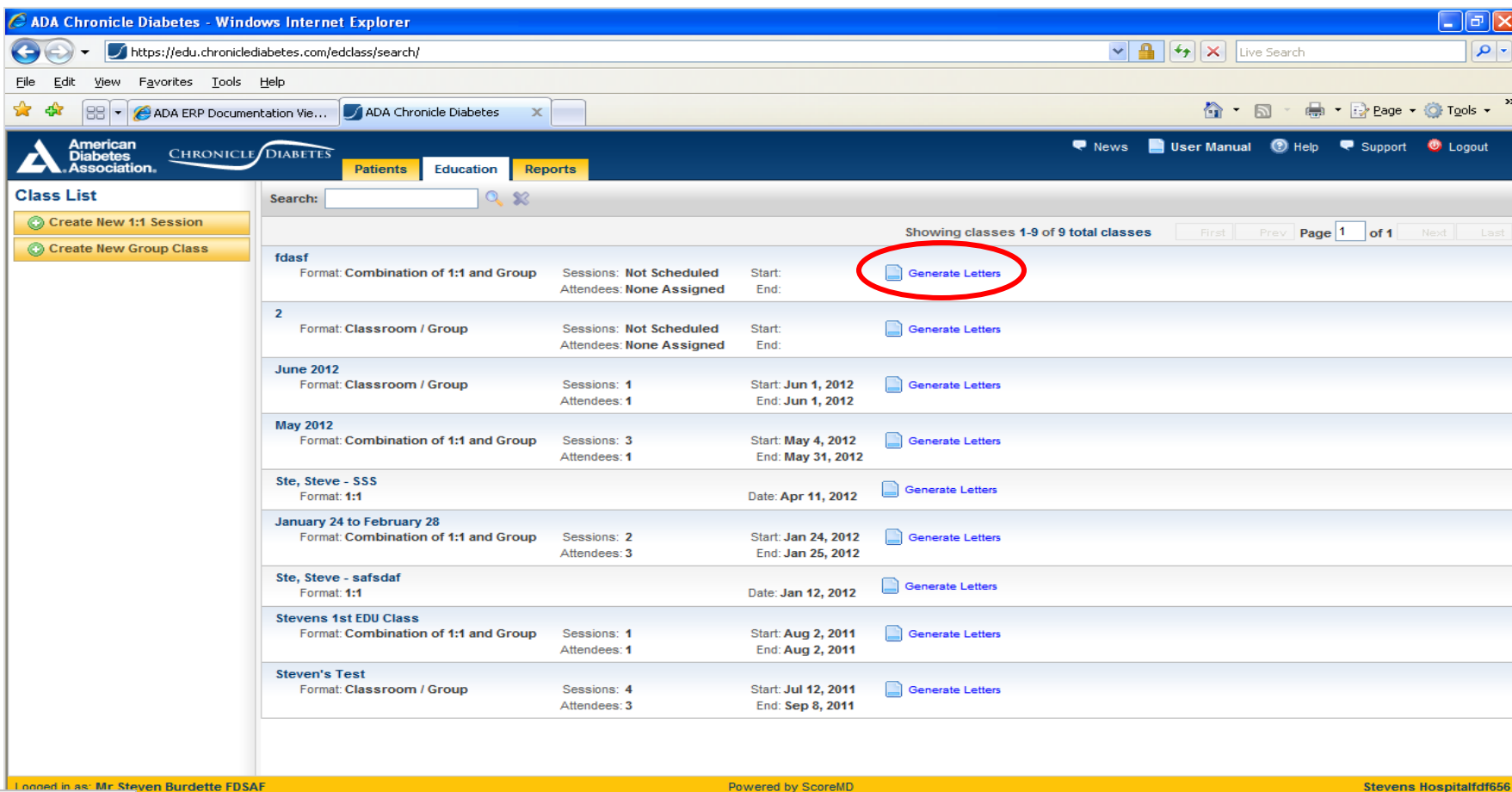
Sincerely,

Stevens Hospitaldf656  
48226 Stevens Rd

The "Letter Preview" window includes a "Help" icon and a "Download Letters" button, both of which are circled in red. A "Close Letter Preview" button is located at the bottom right of the preview window. The footer of the page includes the text "Seven Burdette FDSAF", "Powered by ScoreMD", and "Stevens Hospitaldf656". The browser's status bar at the bottom shows "Internet" and "100%" zoom.

## Generating Letters to send to Class Participants *Page 1 of 4*

After the class has been set up you can create a welcome letter that can be sent (via U.S. mail) to each of the patients to give them initial information and invite them to complete their online initial patient self-assessment (PSA). Return to the main class list by clicking the Return to Class Listing button in the upper left. In the listing row for the class you created, click the **Generate Letters** link on the right side and follow the next 3 steps.



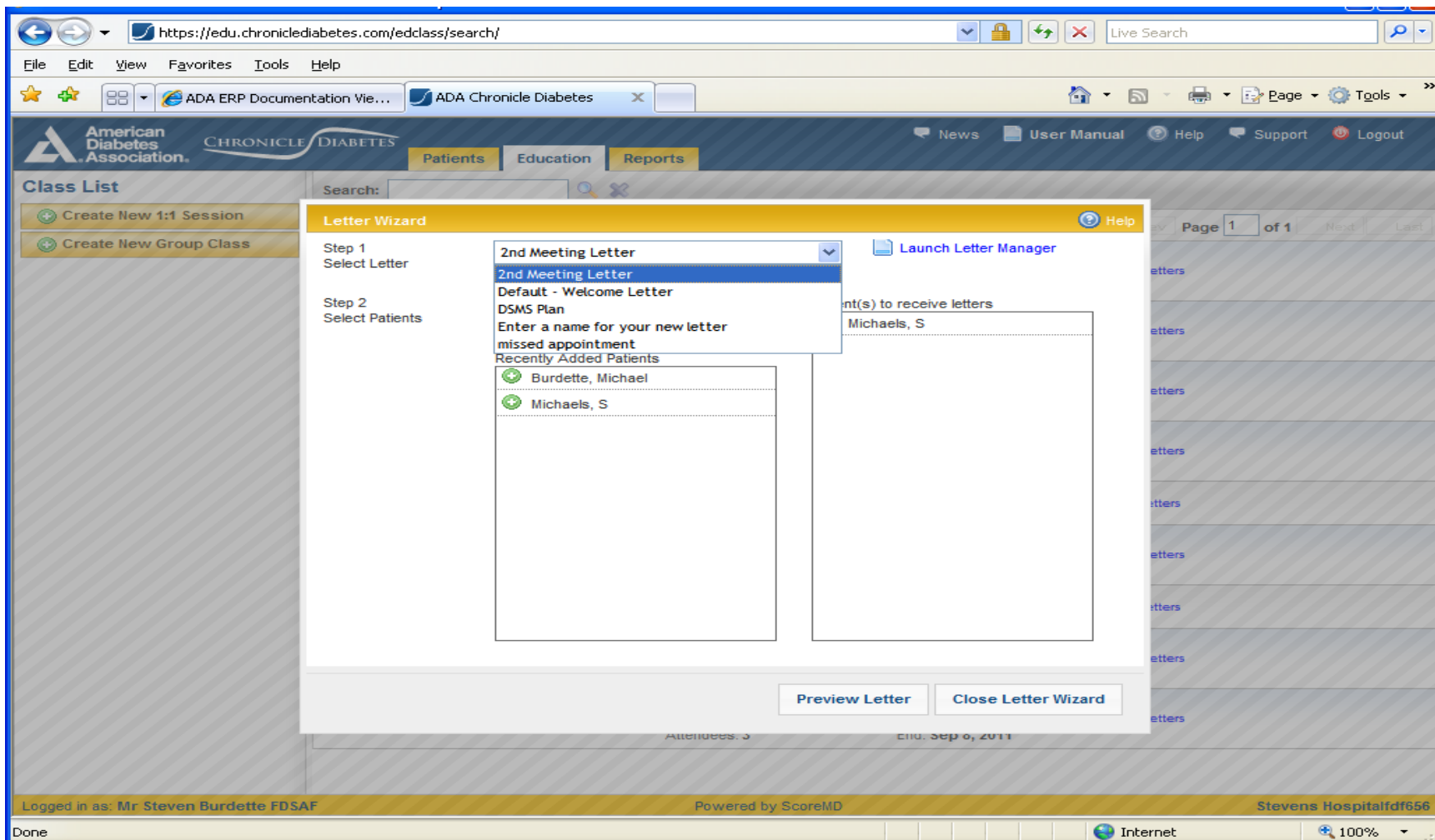
The screenshot shows the ADA Chronicle Diabetes web application interface. The browser window title is "ADA Chronicle Diabetes - Windows Internet Explorer". The address bar shows "https://edu.chronicdiabetes.com/edclass/search/". The application header includes the American Diabetes Association logo, "CHRONICLE DIABETES", and navigation tabs for "Patients", "Education", and "Reports". A sidebar on the left contains "Class List" and buttons for "Create New 1:1 Session" and "Create New Group Class". The main content area displays a table of classes with columns for class name, format, sessions, attendees, start/end dates, and a "Generate Letters" link. The first class, "fdasf", has its "Generate Letters" link circled in red. The table also includes a search bar and pagination controls showing "Showing classes 1-9 of 9 total classes".

Class Name	Format	Sessions	Attendees	Start/End	Generate Letters
fdasf	Combination of 1:1 and Group	Not Scheduled	None Assigned		<a href="#">Generate Letters</a>
2	Classroom / Group	Not Scheduled	None Assigned		<a href="#">Generate Letters</a>
June 2012	Classroom / Group	1	1	Jun 1, 2012 - Jun 1, 2012	<a href="#">Generate Letters</a>
May 2012	Combination of 1:1 and Group	3	1	May 4, 2012 - May 31, 2012	<a href="#">Generate Letters</a>
Ste, Steve - SSS	1:1			Apr 11, 2012	<a href="#">Generate Letters</a>
January 24 to February 28	Combination of 1:1 and Group	2	3	Jan 24, 2012 - Jan 25, 2012	<a href="#">Generate Letters</a>
Ste, Steve - safsdaf	1:1			Jan 12, 2012	<a href="#">Generate Letters</a>
Stevens 1st EDU Class	Combination of 1:1 and Group	1	1	Aug 2, 2011 - Aug 2, 2011	<a href="#">Generate Letters</a>
Steven's Test	Classroom / Group	4	3	Jul 12, 2011 - Sep 8, 2011	<a href="#">Generate Letters</a>

Logged in as: Mr. Steven Burdette FDSAF      Powered by ScoreMD      Stevens Hospitaldf656

### Generating Letters to send to Class Participants *Page 2 of 4*

- 1) Select the letter you would like to create from the drop down list.



The screenshot shows a web browser window with the URL <https://edu.chronicdiabetes.com/edclass/search/>. The page displays the American Diabetes Association Chronicle Diabetes interface. A "Letter Wizard" modal window is open, showing the "Step 1: Select Letter" screen. The "2nd Meeting Letter" is selected from a dropdown menu. Below the dropdown, there is a list of "Recently Added Patients" with two entries: "Burdette, Michael" and "Michaels, S". The "Launch Letter Manager" button is visible. The background shows a "Class List" table with columns for "Attendees" and "End". The footer indicates the user is logged in as "Mr Steven Burdette FDSAF" and the system is powered by "ScoreMD".

Class List

Search:

Create New 1:1 Session

Create New Group Class

Letter Wizard

Step 1: Select Letter

Step 2: Select Patients

2nd Meeting Letter

Default - Welcome Letter

DSMS Plan

Enter a name for your new letter

missed appointment

Recently Added Patients

Burdette, Michael

Michaels, S

Launch Letter Manager

Preview Letter

Close Letter Wizard

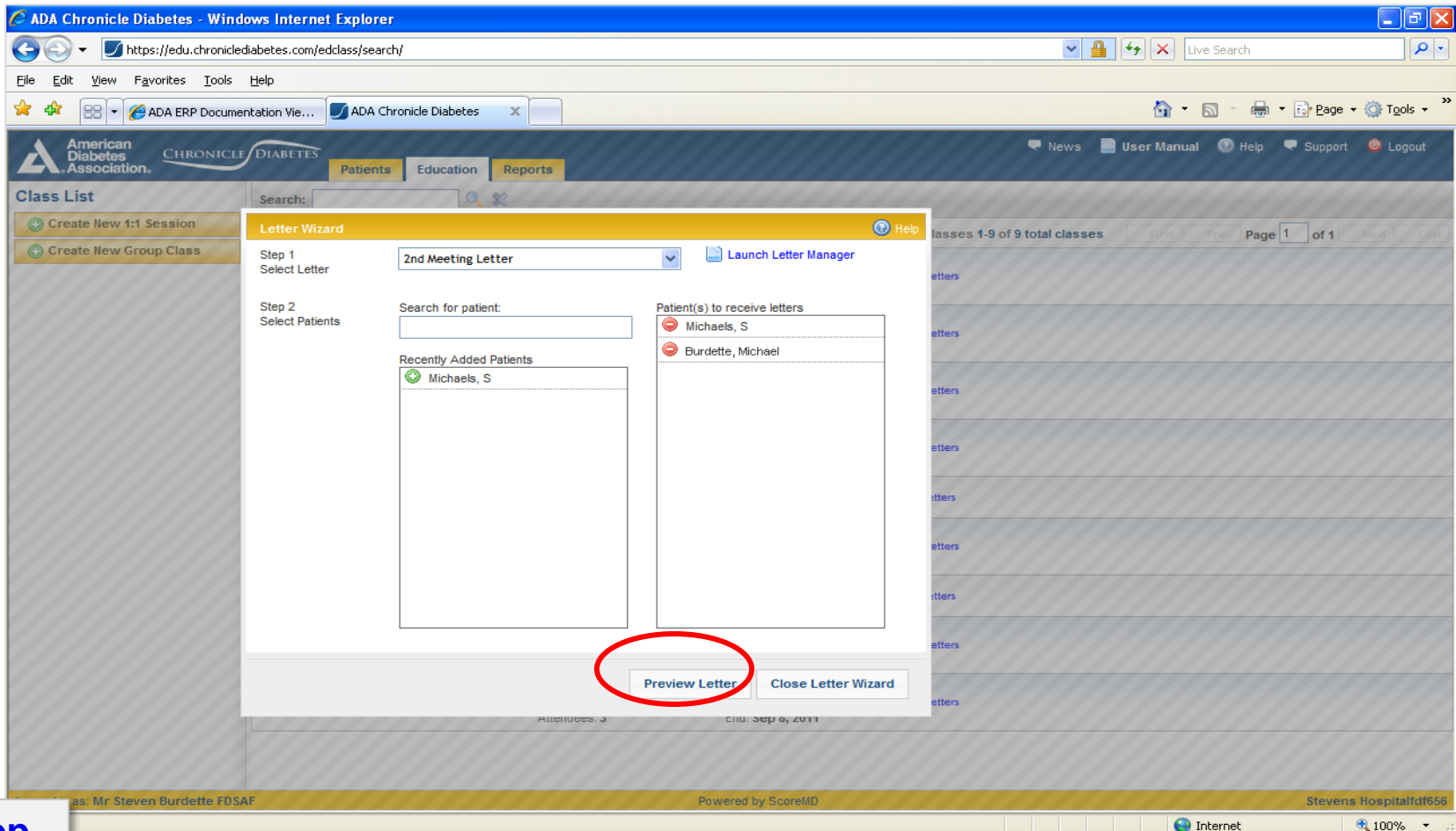
Logged in as: Mr Steven Burdette FDSAF

Powered by ScoreMD

Stevens Hospitaldf656

## Generating Letters to send to Class Participants *Page 3 of 4*

2) Select the patients you would like to receive the letter. By default, all of the patients in the class are selected. If there are any other patients that you would like include, click on the patient's name in the left column to add them to the right column (the recipients list). To remove someone from the recipients list, just click on her name in the right column. When the recipients list is correct; click on **Preview Letter**.



ADA Chronicle Diabetes - Windows Internet Explorer

https://edu.chronicdiabetes.com/edclass/search/

File Edit View Favorites Tools Help

ADA ERP Documentation Vie... ADA Chronicle Diabetes

American Diabetes Association CHRONICLE DIABETES

Patients Education Reports

Class List

Create New 1:1 Session

Create New Group Class

Search:

Letter Wizard

Step 1 Select Letter

2nd Meeting Letter

Launch Letter Manager

Step 2 Select Patients

Search for patient:

Recently Added Patients

Michaels, S

Patient(s) to receive letters

Michaels, S

Burdette, Michael

Preview Letter

Close Letter Wizard

Classes 1-9 of 9 total classes

Page 1 of 1

Mr Steven Burdette FDSAF

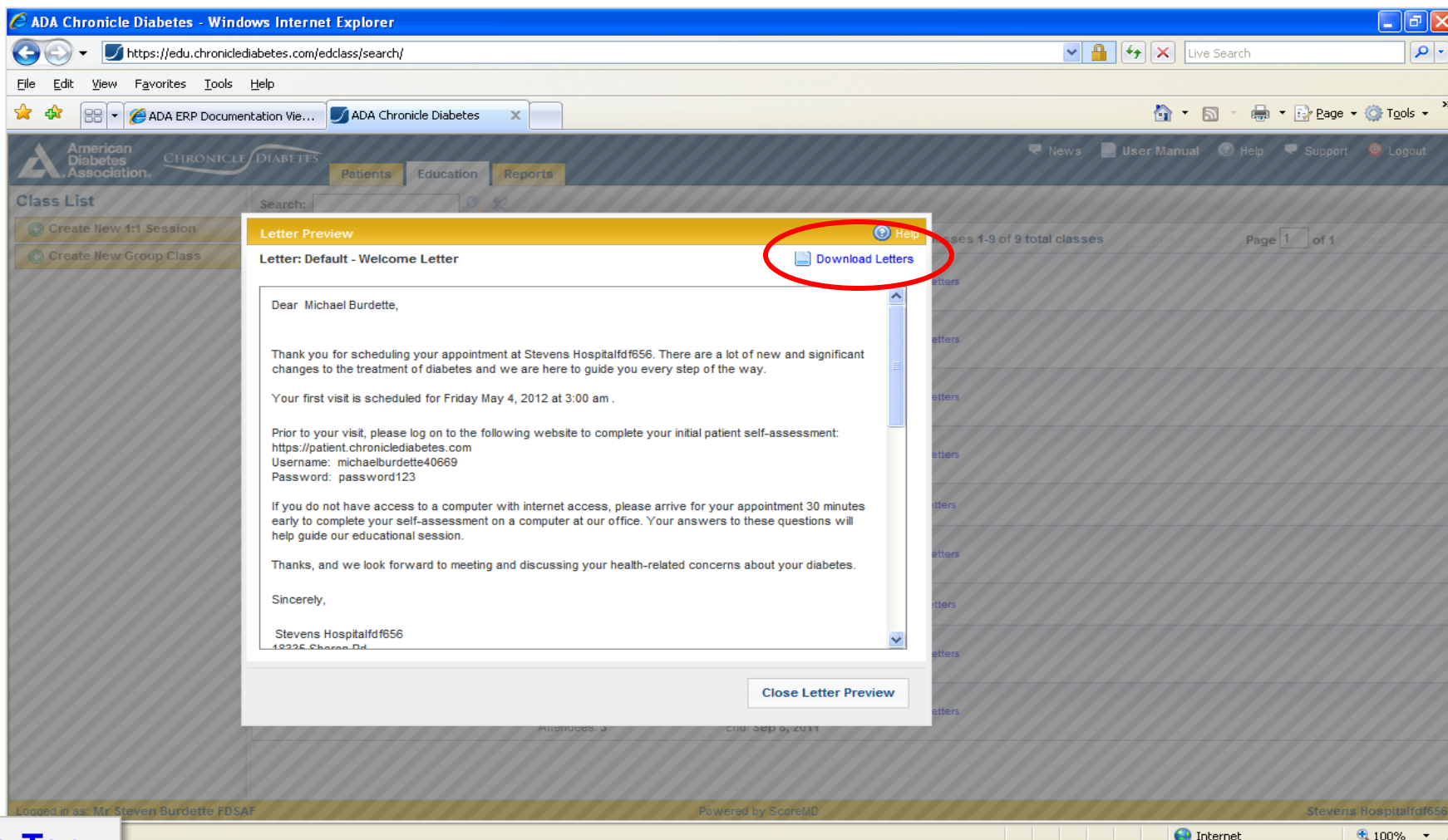
Powered by ScoreMD

Stevens Hospitaldf656

Internet 100%

## Generating Letters to send to Class Participants *Page 4 of 4*

- 3) You will see a preview of the letter(s) that will be created. If this looks correct, click **Download Letters**, which will prompt you to download the resulting Microsoft Word file to your computer. Once the letters file is on your computer you can open it in Microsoft Word, edit it as necessary, and print the letter to send to the patients.



The screenshot shows a web browser window titled "ADA Chronicle Diabetes - Windows Internet Explorer". The address bar displays "https://edu.chronicdiabetes.com/edclass/search/". The browser's menu bar includes "File", "Edit", "View", "Favorites", "Tools", and "Help". The toolbar shows various icons for navigation and search. The website's header features the American Diabetes Association logo and navigation tabs for "Patients", "Education", and "Reports". A "Class List" sidebar on the left offers options to "Create New 1:1 Session" and "Create New Group Class". The main content area displays a "Letter Preview" for a "Default - Welcome Letter". The letter text is as follows:

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https://patient.chronicdiabetes.com  
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Password: password123

If you do not have access to a computer with internet access, please arrive for your appointment 30 minutes early to complete your self-assessment on a computer at our office. Your answers to these questions will help guide our educational session.

Thanks, and we look forward to meeting and discussing your health-related concerns about your diabetes.

Sincerely,

Stevens Hospitaldf656  
18226 Stevens Rd

The "Letter Preview" window includes a "Help" icon and a "Download Letters" button, which is circled in red. A "Close Letter Preview" button is located at the bottom right of the preview window. The background shows a list of classes, with "Classes 1-9 of 9 total classes" and "Page 1 of 1" visible. The footer of the website indicates the user is logged in as "Mr Steven Burdette FDSAF" and the site is "Powered by ScoreMD". The browser's status bar at the bottom shows "Internet" and "100%" zoom.

## Letter Manager Tips

- The default welcome letter (already within Chronicle) provides you with the login details and web address for the online Patient Self-Assessment. (This can be sent via postal mail or copied and pasted into an email to send to the patient.
- You have the ability to copy and past your own existing letters into the letter wizard and save them accordingly. .
- Organization Logos are not able to be uploaded into the Letter Wizard. You may add a logo once the letter has been exported to a Word document.



## Chronicle Resources

- [Chronicle User Manual](#)
- [Recorded Chronicle Webinar](#)
- [Chronicle Reports Guide](#)
- [Demo version of Chronicle](#)
- [Required Data for an Annual Status Report](#)
- [Required Data for an Application](#)
- [Chronicle Diabetes Assessment Form](#)
- [Chronicle Diabetes Assessment Form](#) (Spanish)

For assistance with Chronicle Diabetes please contact ADA staff at [ERP@diabetes.org](mailto:ERP@diabetes.org) or 888-232-0822.

